Telkom Easy SMS

USER MANUAL

Revision History

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Preface

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1 SYSTEM OVERVIEW

The Telkom SMS system consists of a dedicated SMS modem and PC application.

The SMS Modem is capable of transmitting and receiving SMS's over normal analogue PSTN lines by communicating with an SMS server deployed by TELKOM.

In order for this facility to operate, the CLI ('Caller Line ID') service, provided by TELKOM, must be enabled.

The SMS functionality will be automatically enabled when you send your first SMS. The server will reply with a welcome message to alert you that the service is now enabled.

If CLI is not enabled on your line, please contact TELKOM and request this service before attempting to send SMS's.

The PC application communicates with the SMS modem and provides the platform to manage the transmission and reception of SMS's as well as providing many additional features.

Please follow the installation guide when installing the product and view the System Features.

To assist in using the system, please refer to the Getting Started section.

2 FEATURE OVERVIEW

2.1 Contact Management

Contacts details can be entered manually, imported from Microsoft Outlook or text file. Contact information is used for storing information required for sending SMS's and emails as well as automatic functions such as birthday greetings.

Contacts can be grouped into distribution groups, that can be used for sending bulk SMS's. Bulk SMS's can be personalized to the contacts.

2.2 SMS operation

SMS's are organized into SMS mailbox's, namely, the Inbox, Outbox, Pending, Sent and Draft providing an interface similar to email operation.

Multiple recipients can be assigned to SMS's and the system supports SMS reply and forward functions.

Furthermore, emails can be converted to SMS's and SMS's can be converted to emails when the Microsoft Outlook function is enabled.

2.3 Email integration

By linking to Microsoft Outlook the system is able to view and send emails as well as access contact information. Automated conversion of SMS to email and email to SMS is also supported.

2.4 Notes

Notes entered into the system can be attached to contacts, calls and SMS's sent as appointment reminders.

2.5 Call Management

The details of incoming calls are stored in the system. The records store the originating number / contact as well as duration and whether the call was answered.

On call detection, historical information (sms, emails, calls and notes) related to the identified caller is displayed.

It is also possible to record the conversation during both incoming and outgoing calls.

2.6 Appointment and reminders

The application has an appointment manager for recording appointments. Reminders can be scheduled against appointments and will be delivered on the day prior to the appointment. Notes attached to an appointment can be attached to the reminder.

2.7 Payment reminders

This feature is used to remind clients of invoices that are unpaid. The system automatically transmits reminder SMS's until the invoice is marked as cleared.

The sent SMS's include a configurable message as well as the following:

Invoice reference
Invoice date
Invoice amount.

3 GETTING STARTED

Before using the system, please familiarise yourself with the available system functions.

The first step required is to configure the system. The program will start with a default configuration, but please complete this step to ensure correct configuration.

3.1 Adding Contacts

Before sending SMS's, it is best to enter in the details of Contacts that you wish to use on the system. The Contact details contain the telephone numbers and email addresses used when sending SMS's or emails.

Contacts can be manually entered or imported from Microsoft Outlook (if installed on your computer)

Contacts can be grouped together into Distribution Lists to facilitate sending SMS's to multiple recipients.

3.2 Working with SMS's

Using SMS's is very similar to working with emails. SMS's are stored in a number of mailboxes:

INBOX	- Received SMS's
PENDING	- SMS's waiting to be sent
SENT	- SMS's that have been sent
DRAFT	- Saved SMS's

SMS's can be sent from the Contacts List, from the SMS List or using the Bulk SMS facility. If you wish to send SMS's to many recipients and personalise the messages to the recipient details, use the Bulk SMS facility.

Emails can also be converted to SMS's. (Note: Microsoft Outlook must be installed on your computer and the email function must be enabled).

SMS's can be converted to emails.

3.3 Working with emails

To enable email operation, it is necessary to configure the system and to have Microsoft Outlook installed on your computer.

Emails are stored in a number of mailboxes:

INBOX - Received emails
PENDING - Emails waiting to be sent
SENT - Emails that have been sent
DRAFT - Saved emails

Emails can be viewed or new emails created from the Email List.

Emails can also be converted to SMS's.

3.4 Working with Notes

Notes can be used to store information about clients or contacts. Notes are listed in the Notes List.

Notes can be added from the areas:

Contacts List Note
Notes List
Call Information Form
Appointment Manager

3.5 Call Logging Facilities

The Telkom SMS modem can identify calls using the CLI system. The calls are recorded in the Call List, and are displayed in the Call Information Form during the call.

If you prefer that the Call Information Form is not displayed, this can be configured in the Setup Configuration Form.

Incoming and Outgoing calls can also be recorded and played back.

3.6 Working with Reminders and Appointments

Reminders are SMS's that get generated automatically to remind clients of appoints or issues. Reminders can be created ahead of time, but will only be transmitted the day before the scheduled appointment time.

The text of the SMS generated can be configured for both the making of and cancelling of the Reminder or appointment.

Reminders can be generated manually or using the Appointment Manager.

Reminders can be viewed using the Reminder List.

3.7 Payment Reminders

Payment Reminders are similar, but are used to create SMS's to remind clients of overdue invoices or payments made.

The text of the SMS generated can be configured for both the payment overdue and payment received.

Payment Reminders can be viewed and created in the Payment Reminder List. The times when the SMS's are sent can be configured when creating the reminder.

When the reminder is marked as paid, the Payment Received SMS is sent.

4 SYSTEM REQUIREMENTS

The following system requirements are required for the product to operate successfully:

4.1 Supported operating systems:

Windows 98
Windows 98SE
Windows 2000
Windows XP

4.2 Memory Requirements:

Greater 128KB RAM

4.3 Interface requirements:

USB Port
Sound Card (if call recording required)

4.4 Network requirements:

Telkom telephone line with CLI (caller line ID) enabled.

Notes:

1. Although call recording is supported, this is an additional feature, and the audio quality of recorded calls is not guaranteed.
2. The product can operate on PABX extensions but SMS reception is not possible in this case.

5 SMS MODEM

IMPORTANT: DO NOT CONNECT THE MODEM TO THE COMPUTER BEFORE INSTALLING THE SOFTWARE

The SMS modem has the following connectors:

USB	– used to connect the modem to the PC (cable supplied)
LINE	- connect the telephone line to this input (cable supplied)
TELEPHONE	- connect the telephone to this input
RECORD	- connect this to the PC soundcard input (cable supplied)

The modem has 5 LED indicators to signal the operational mode (from top right to bottom left):

USB	- Lit when connected to PC (see Modem Indicators)
Message	- Lit when message in modem buffer
Call Waiting	- not currently used
Timer	- Flashes when message waiting to be re-sent
Line Status	- Flashes when message being sent. Lit when line seized.

5.1 Installing the SMS Modem

IMPORTANT: DO NOT CONNECT THE MODEM TO THE COMPUTER BEFORE INSTALLING THE SOFTWARE

When the software installation is complete, using the windows taskbar, select ***Start*, *All Programs*, *Telkom SMS*, *Telkom SMS Driver Installation***

Click the install button to pre-install the modem drivers.
Once the drivers are installed, connect the modem to the PC using the USB cable. Follow the instructions should any installation dialogs be displayed.
The system will now be ready for operation.

Run the program using the windows taskbar, select ***Start*, *All Programs*, *Telkom SMS*, *Telkom SMS***

Related topics:

Modem Indicators
SMS Modem

6 INSTALLING THE SMS SOFTWARE

IMPORTANT: DO NOT CONNECT THE MODEM TO THE COMPUTER BEFORE INSTALLING THE SOFTWARE

Insert the supplied CD into your CD drive on the PC. The installation program will execute automatically.

Follow the instructions in the setup application to install the software. Please use the typical setup when performing the install.

When the installation is complete, using the windows taskbar, select ***Start, All Programs, Telkom SMS, Telkom SMS Driver Installation***

Click the install button to pre-install the modem drivers.

Once the drivers are installed, connect the modem to the PC using the USB cable. Follow the instructions should any installation dialogs be displayed.

The system will now be ready for operation.

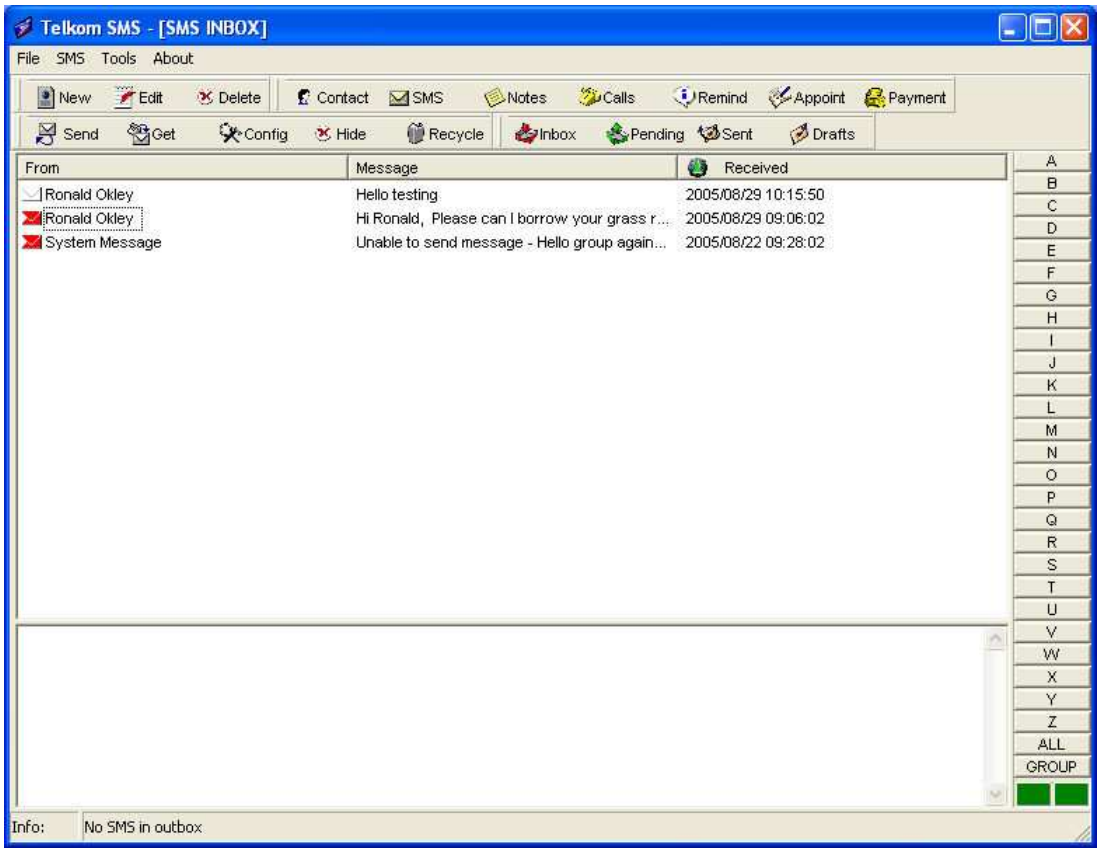
Run the program using the windows taskbar, select ***Start, All Programs, Telkom SMS, Telkom SMS***

Related topics:

Modem Indicators
SMS Modem

7 SYSTEM FORM

The following screen is displayed when executing the Telkom SMS system:


Telkom SMS - [SMS INBOX]
File SMS Tools About
New Edit Delete Contact SMS Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle Inbox Pending Sent Drafts
From Message Received
Ronald Okley Hello testing 2005/08/29 10:15:50
Ronald Okley Hi Ronald, Please can I borrow your grass r... 2005/08/29 09:06:02
System Message Unable to send message - Hello group again... 2005/08/22 09:28:02
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
Info: No SMS in outbox

The screen is divided into the main areas as listed below:

File Menu
Task Bar
Side Bar
List Area
Filter Bar
Modem Indicators

7.1 Form List Area

The Form List area is used to display the items stored in the system. The may be Contacts, SMS's, emails, Calls, Reminders or appointments.

Operation can be performed on these items using the File Menu, Task Bar or Popup Menu.

Sorting of columns on the list forms is possible by clicking on the Column header. An arrow on the column header will indicate the direction of sort. To change the direction, simply click on the column header

7.2 Filter Bar

The Form List area is used to display the items stored in the system. The may be Contacts, SMS's, emails, Calls, Reminders or appointments.

Operation can be performed on these items using the File Menu, Task Bar or Popup Menu.

The items displayed can be filtered by clicking on the character button in the filter bar (shown below). This will limit items to the ones that match the Contact whose name starts with the selected character.

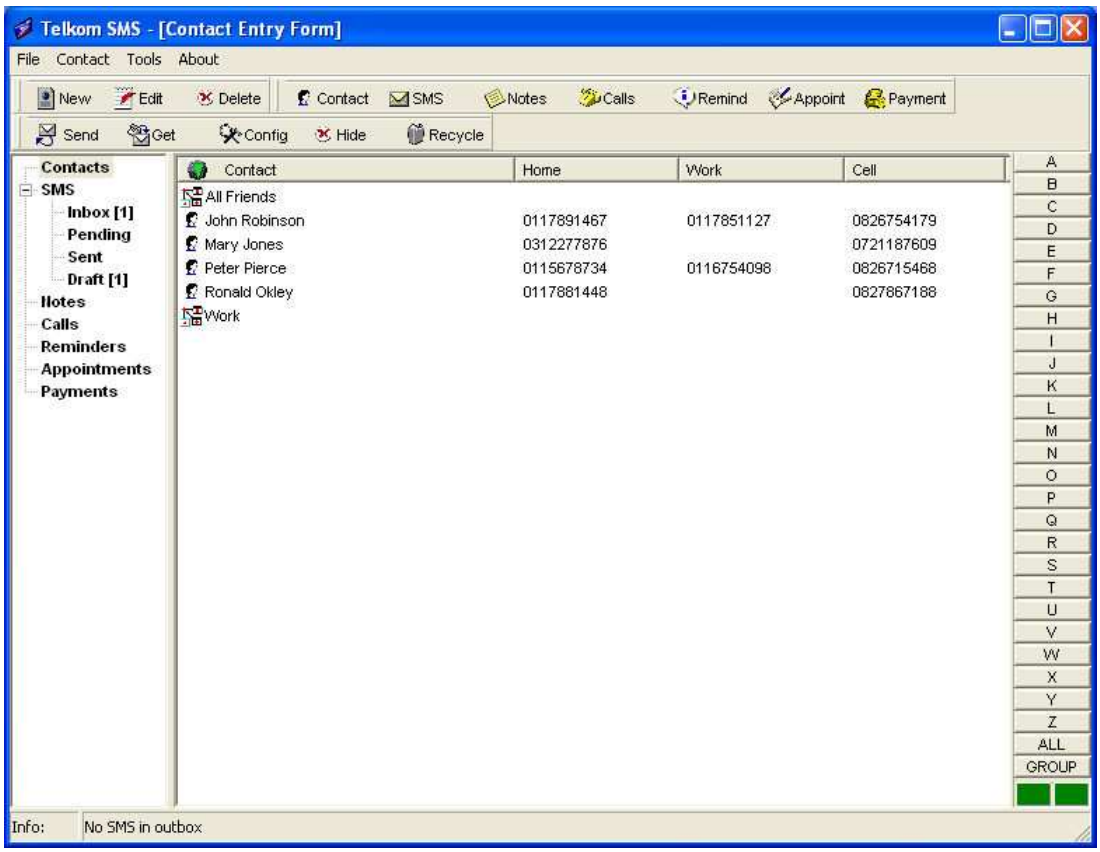
To view all items, click on the **[All]** Button.

To filter items to a distribution list, click on the **[Group]** Button, and select the group required.

7.3 System Form with Side Bar

The following screen is displayed when executing the Telkom SMS system.

The Side Bar is displayed by enabling the Side Bar function in the Setup Configuration Form.


Telkom SMS - [Contact Entry Form]
File Contact Tools About
New Edit Delete Contact SMS Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle
Contacts
SMS
Inbox [1]
Pending
Sent
Draft [1]
Notes
Calls
Reminders
Appointments
Payments
Contact Home Work Cell
All Friends
John Robinson 0117891467 0117851127 0826754179
Mary Jones 0312277876 0721187609
Peter Pierce 0115678734 0116754098 0826715468
Ronald Okley 0117881448 0827867188
Work
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
Info: No SMS in outbox

The Side Bar can also be used to change the list context, by clicking on the context required.

7.4 File Menu

Most function can be performed using the file menu.

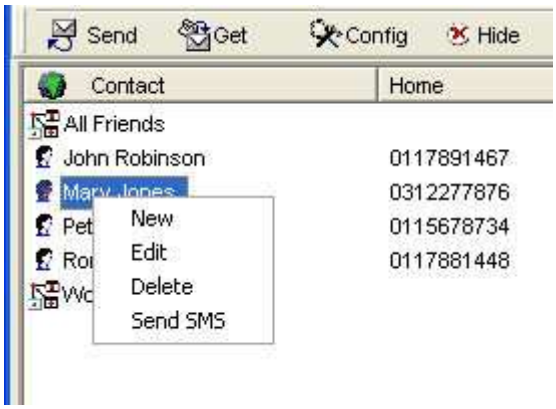
To select an option click on the relevant menu and the menu options will be displayed.

Select the function you require from the file menu sub-items.

7.5 Popup Menus

In addition to the Task Bar and File Menu, Popup menu's can be used to perform functions.

To activate Popup menus, right click on the item required in the list areas displayed to activate the available menus (as shown below).



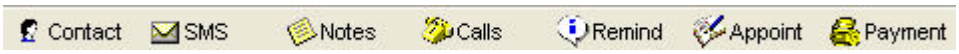
7.6 Task Bar

The Task Bar is divided into a number of sub-task bars as shown below:

7.6.1 Creating and Manipulating Entries

Use the above task bar to create, edit or delete items according to the context of the system.

7.6.2 Changing Context



Use the above task bar to change the context of the screen to:

Contact
SMS
Email
Notes
Calls
Reminders
Appointments
Payments

7.6.3 General Functions

The following functions can be performed from this task bar:

[Send] Send any SMS's in the pending list to the modem. (Generally not required)
[Get] Retrieve any new SMS's in the modem (generally not required)
[Config] System configuration
[Hide] Hide the application on the System Tray
[Recycle] Sub menu's available for cleaning deleted items from the database

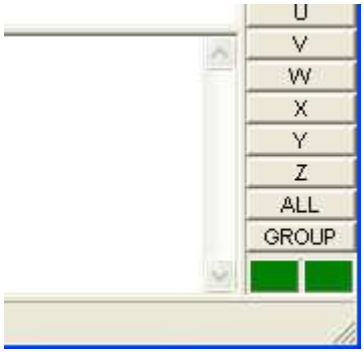
7.7 SMS and email Taskbar

When the SMS or email function is selected, an additional taskbar menu will be displayed:

Use this menu the quickly change between the different mailbox area's.

7.8 Communication lights

Two indicators display the status of communications to the modem. These are situated on the bottom right of the screen as shown below.



The indicators will flash red when communications is active to the modem. One indicates transmission to the modem and the other reception from the modem.

A useful test to indicate if communications to the modem is successful is to click on the **[Get]** button on the taskbar and then to watch if the indicators flash.

If the indicators do not flash, make sure that you have installed the modem drivers , the modem is connected to the PC USB port and then using the system configuration form, click on **[Find modem]** button to auto detect the modem.

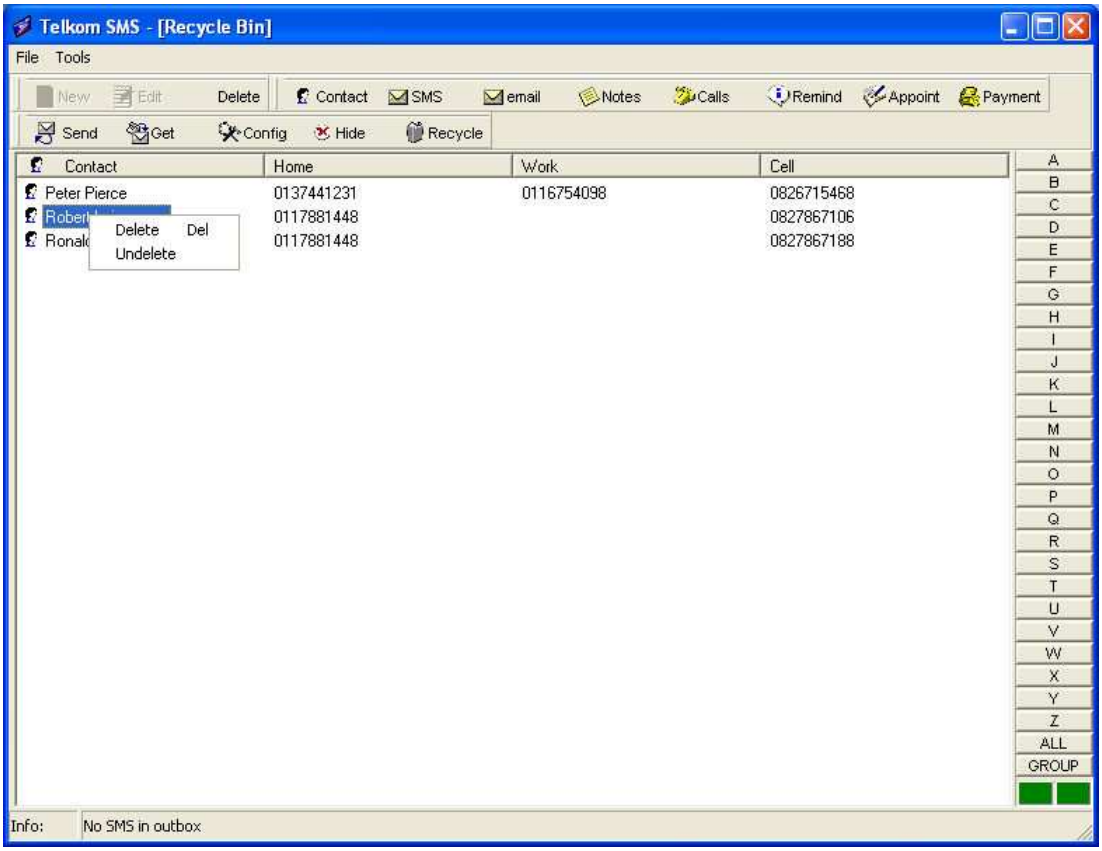
7.9 Recycle Bin

Items deleted in the lists or Managers are not actually removed from the system.

Deleted items can be viewed in the respective recycle bins.

To view a recycle bin, click on **[Recycle]** on the Taskbar . A list of options will be displayed as shown below.

Select the bin you would like to view. The Recycle bin form will be displayed.



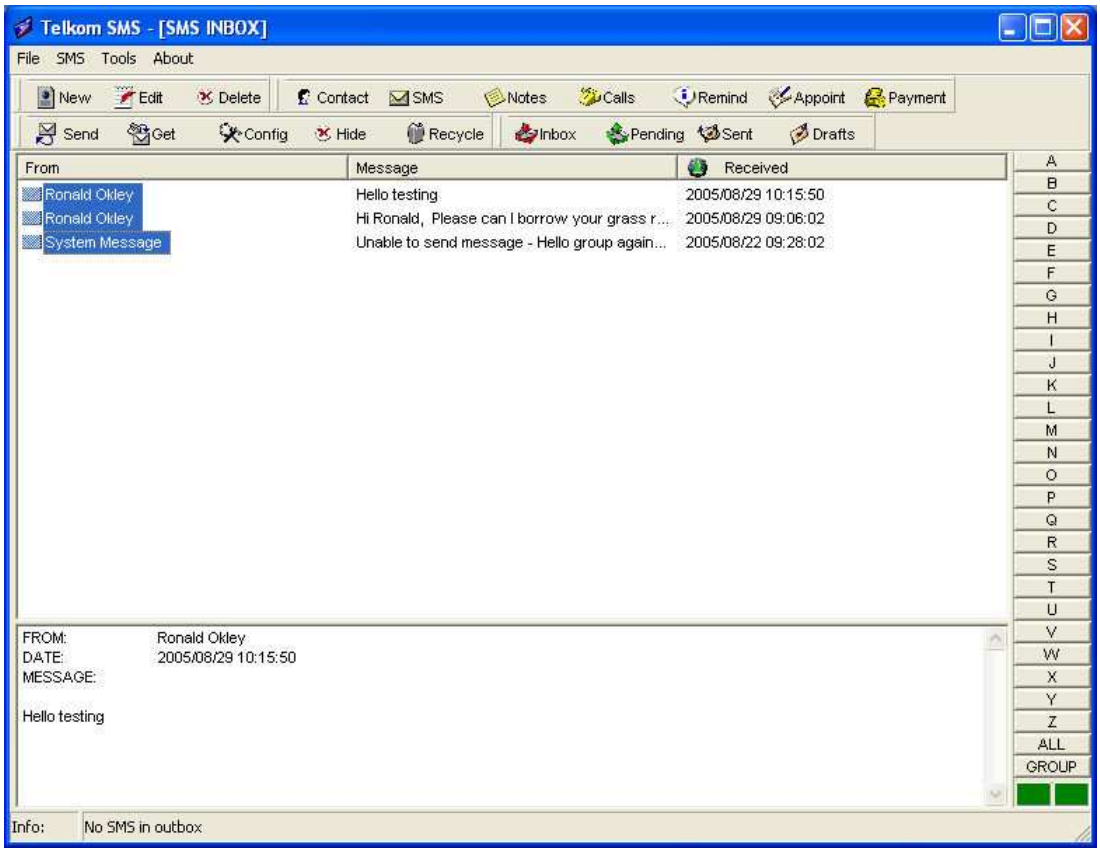
Items can be permanently deleted from the system using the popup menu and selecting **Delete**.

Items can be un-deleted (and will reappear in the corresponding lists) by selecting **Un delete**.

It is good practice to delete items that are not required from time to time. This will ensure the best response from the application.

7.10 Selecting a Range of Items from a List

When performing certain functions (such as deletes), multiple items can be selected as shown below.


Telkom SMS - [SMS INBOX]
File SMS Tools About
New Edit Delete Contact SMS Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle Inbox Pending Sent Drafts
From
Message
Received
Ronald Okley
Hello testing
2005/08/29 10:15:50
Ronald Okley
Hi Ronald, Please can I borrow your grass r...
2005/08/29 09:06:02
System Message
Unable to send message - Hello group again...
2005/08/22 09:28:02
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
FROM: Ronald Okley
DATE: 2005/08/29 10:15:50
MESSAGE:
Hello testing
Info:
No SMS in outbox

To select a range of items, highlight the first item (by clicking on it), hold down the **SHIFT** key and select the last item required.

Individual items in a multiple select can be selected using the **CTRL** key.

To select all items in the list, hold down the **SHIFT** key and press the ‘A’ button.

8 CONFIGURATION

Two configuration forms are available to configure the system.

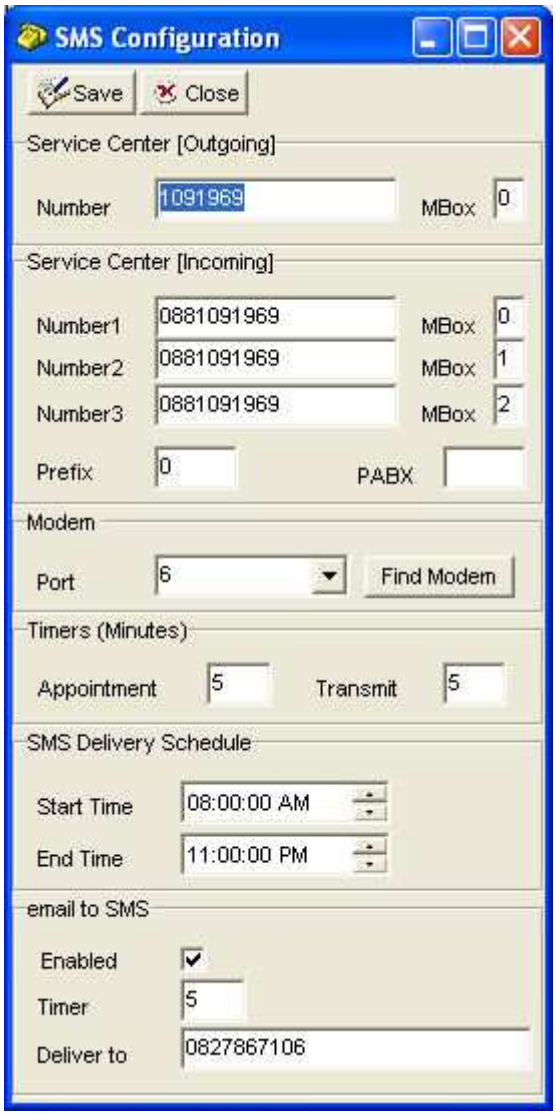
One is used to customise the operation of the system and the other to select what functionality is available to the user.

To configure the system click on the **[CONFIG]** button on the Task Bar as indicated below, and select '**SYSTEM**' or '**SETUP**'.

System	- Basic system settings
Setup	- Functions available
Birthday Greeting	- SMS text configuration
Signature	- SMS signature configuration
Payment Overdue	- SMS text configuration
Payment Received	- SMS text configuration
Appointment Reminder	- SMS text configuration
Appointment Cancellation	- SMS text configuration

8.1 System Configuration

The following form will be displayed to allow for configuration of the SMS system:



8.1.1 Service Center [Outgoing]

Specify the number to dial to connect to the SMS server.
The default number for the TELKOM server is 1091969.

Specify the mailbox for this modem in the ‘Mbox’ field. Default should be 0.

8.1.2 Service Center [Incoming]

Three numbers can be specified that the modem will detect as SMS server incoming calls.

Specify the server number and mailbox number as required. The configuration above is setup to detect messages on three mailbox's.

If you would like to receive messages on all mailbox's, the use the '*' character:
Ie: number 1 = 0881091969 Mbox = *

The default number for the TELKOM server is 0881091969.

The Prefix should always be set to 0 for units operating within South Africa.

If the unit is connected on a PABX extension, the PABX digit should be set to the number dialled to access an outside line.

If the unit is configured in this way, the unit can only send SMS's, not receive them.

8.1.3 Modem

After installation of the software, please click the 'Find Modem' button to auto-detect the Modem port.

The dropdown box can also be used to manually select the modem port.

8.1.4 Timers

Two timers are used to scan for appointment reminders and SMS's that are ready to be sent. The timer resolution is in minutes.

The appointment timer is used to generate reminder SMS's for pending appointments. These SMS's will be sent 24 hours before an appointment matures.

The transmit timer is used to send any messages pending in the SMS Pending box. When the timer matures, all messages in the Pending box will be sent.

8.1.5 SMS Delivery Schedule

These times are used to restrict the times at which SMS's can be sent. No SMS's will be delivered before the 'Start Time' or after the 'End Time'. This is useful to prevent SMS's from being sent at unfriendly times.

8.1.6 Email to SMS

The Telkom SMS system allows emails received from specified contacts to be forwarded by SMS(s) to a specified number.

In order for this function to operate, Microsoft Outlook must be installed on the computer, the relevant contacts must be configured, and the email function must be enabled in the Setup Config Form.

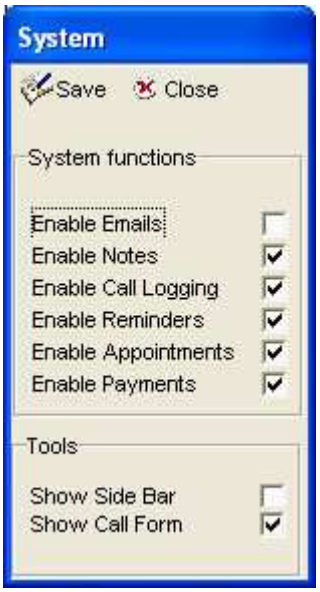
Click the Enabled checkbox to enable this function.
The Timer specifies the rate at which the system will search for emails to be converted. The timer resolution is in minutes.

Use the Deliver to edit box to specify the number to which these emails should be delivered as SMS(‘s).

Emails that are longer than 160 characters in length will be divided and sent as a number of SMS’s.

8.2 Setup Configuration

The following form will be displayed to allow for configuration of the application:



8.2.1 Enable emails

In order for the email function to operate, Microsoft Outlook must be installed on the computer.

Enable this checkbox to allow for the following sub-functions:

Email viewing.
Importing of contact details from Microsoft Outlook.
Forwarding of emails to SMS('s)
Email to SMS converter.
SMS to email converter.

8.2.2 Enable notes

Notes can be used to record information about contacts and appointments. Enable this checkbox to make this facility available.

8.2.3 Enable Call Logging

The Telkom SMS system has the capability of detecting the calling number of any incoming calls. During incoming ringing the system will detect the number and try and identify the calling party from the list of entered contacts.

If a match is found, the system will alert on the incoming call and display historical information recorded for the detected contact.

The details of all incoming calls are maintained in the calls list.

Enable this checkbox should you require this functionality.

During the call a screen is displayed with relevant historical information relating to the calling party. Should you not wish this screen to be displayed, un-check the ‘Show Call Form’ in the ‘Tools’ sub-menu.

8.2.4 Enable Reminders

Reminders can be sent to inform contacts of pending appointments. When a reminder is set, it will be delivered by SMS 24 hours before the appointment.

If a reminder is cancelled, a cancellation SMS is immediately delivered.

Enable this checkbox should you require this functionality.

8.2.5 Enable Appointments

If you require appointment and reminder management, enable this checkbox.

8.2.6 Show Side Bar

The side bar or task bar can be used to navigate the system.

Enable / disable the side bar with this checkbox.

8.3 Setting the Birthday greeting

Select this option from the **[Config]** button on the Task Bar and type the message you would like to have delivered as a birthday greeting.

Three buttons are available on the right hand side of the text box. These allow you to customise the text that will be displayed in the SMS sent to the birthday recipient.

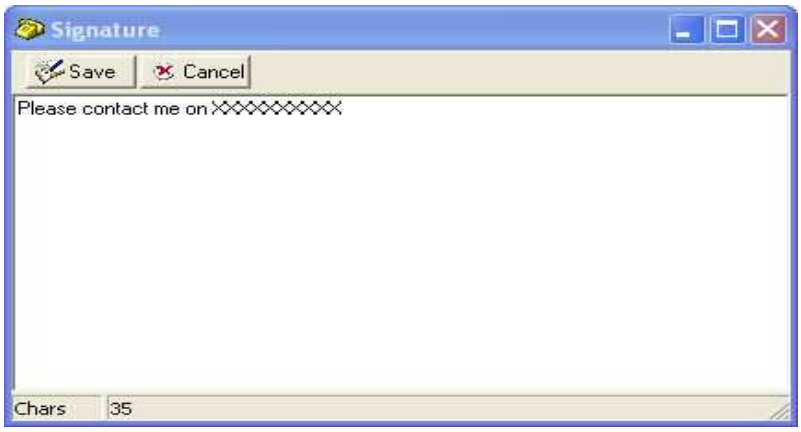
Title - will insert the title of the recipient as entered under the contacts
Firstname - will insert the first name of the recipient as entered in contacts
Lastname - will insert the last name of the recipient as entered in contacts

For example, if you click the **[Title]** button, the text <TITLE> will be inserted into the text field.

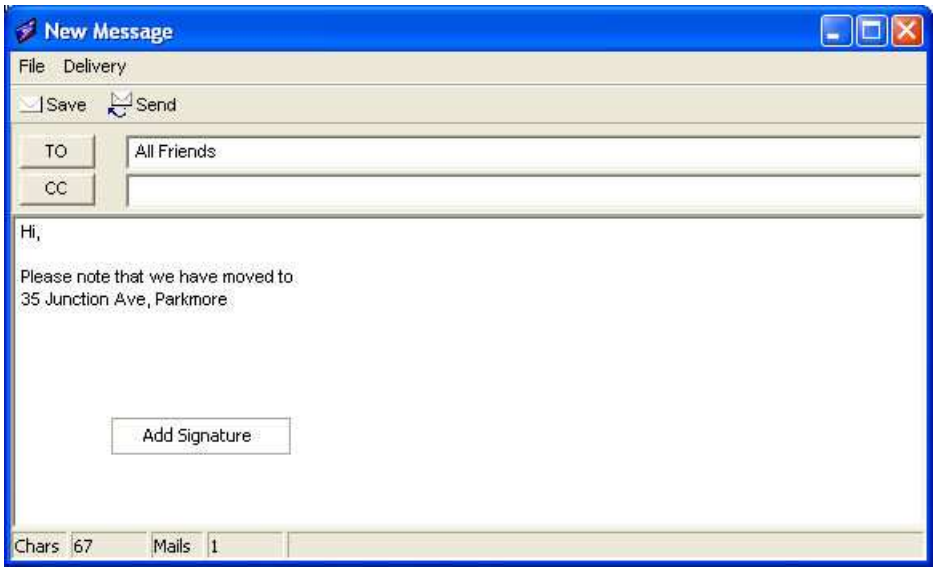
When the message is transmitted, <TITLE> will be substituted for the title of the contact to which the SMS is being sent.

8.4 Setting a Signature

Select this option from the **[Config]** button on the Task Bar and type the message you would like to have as a signature.

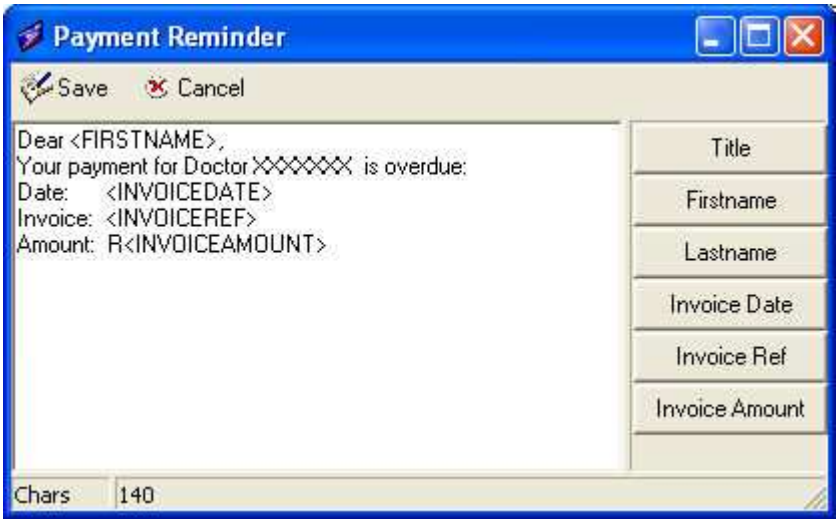


The signature text can be added to SMS's by right clicking on the SMS text box and selecting 'Add Signature' as shown below. This is useful to add standard information, such as address or company information to all messages being sent.



8.5 Setting the Payment Reminder text

Select this option from the **[Config]** button on the Task Bar and type the message you would like to have as a Payment Reminder SMS.



Insert the text you would like to be included in the Invoice Payment Reminders SMS.

Six buttons are available on the right hand side of the text box. These allow you to customise the text that will be displayed in the SMS sent to the payment reminder recipient.

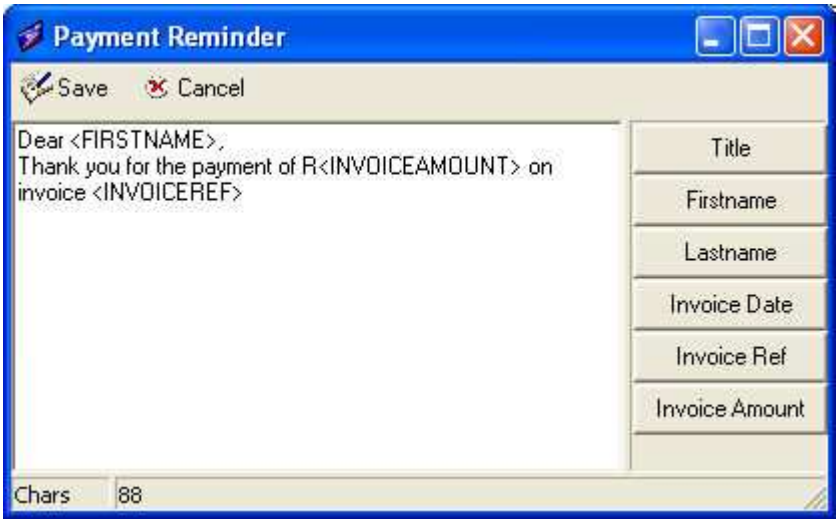
Title - will insert the title of the recipient as entered in contacts
Firstname - will insert the first name of the recipient as entered in contacts
Lastname - will insert the last name of the recipient as entered in contacts
Invoice Date - will insert the date of the invoice as entered in reminder
Invoice Ref - will insert the reference of the invoice as entered in reminder
Invoice Amount - will insert the amount of the voice as entered in reminder

For example, if you click the **[Title]** button, the text <TITLE> will be inserted into the text field.

When the message is transmitted, <TITLE> will be substituted for the title of the contact to which the SMS is being sent.

8.6 Setting the Payment Received text

Select this option from the **[Config]** button on the Task Bar and type the message you would like to have as a Payment Received SMS.



Insert the text you would like to be included in the Invoice Payment Received SMS.

Six buttons are available on the right hand side of the text box. These allow you to customise the text that will be displayed in the SMS sent to the payment received recipient.

Title - will insert the title of the recipient as entered in contacts
Firstname - will insert the first name of the recipient as entered in contacts
Lastname - will insert the last name of the recipient as entered in contacts
Invoice Date - will insert the date of the invoice as entered in reminder
Invoice Ref - will insert the reference of the invoice as entered in reminder
Invoice amount - will insert the amount of the invoice as entered in reminder

For example, if you click the **[Title]** button, the text <TITLE> will be inserted into the text field.

When the message is transmitted, <TITLE> will be substituted for the title of the contact to which the SMS is being sent.

8.7 Setting the Appointment Reminder text

Select this option from the **[Config]** button on the Task Bar and type the message you would like to have as an Appointment Reminder SMS.

Insert the text you would like to be included in the Appointment / Reminder SMS.

Five buttons are available on the right hand side of the text box. These allow you to customise the text that will be displayed in the SMS sent to the Appointment Reminder recipient.

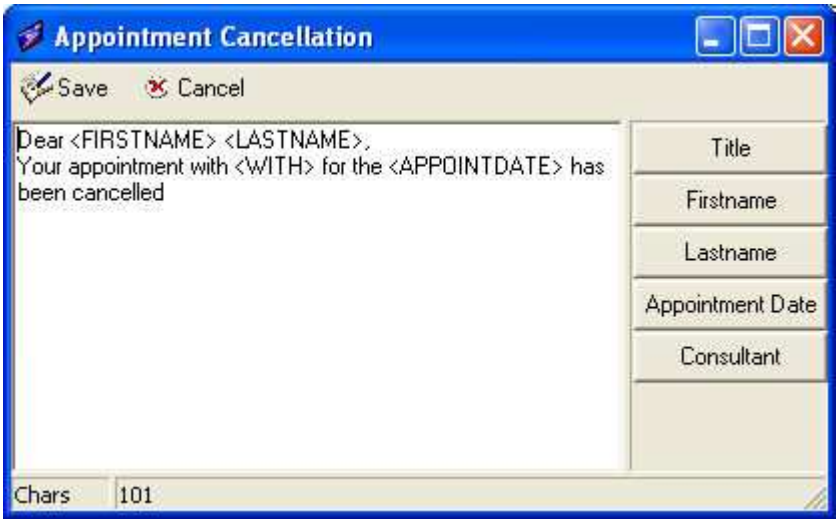
Title - will insert the title of the recipient as entered in contacts
Firstname - will insert the first name of the recipient as entered in contacts
Lastname - will insert the last name of the recipient as entered in contacts
Appointment Date - will insert the reminder date as entered in reminder
Consultant - will insert the consultant name as entered in reminder

For example, if you click the **[Title]** button, the text <TITLE> will be inserted into the text field.

When the message is transmitted, <TITLE> will be substituted for the title of the contact to which the SMS is being sent.

8.8 Setting the Appointment Cancellation text

Select this option from the **[Config]** button on the Task Bar and type the message you would like to have as an Appointment Cancellation SMS.



Insert the text you would like to be included in the Appointment / Reminder Cancellation SMS.

Five buttons are available on the right hand side of the text box. These allow you to customise the text that will be displayed in the SMS sent to the Appointment Cancellation recipient.

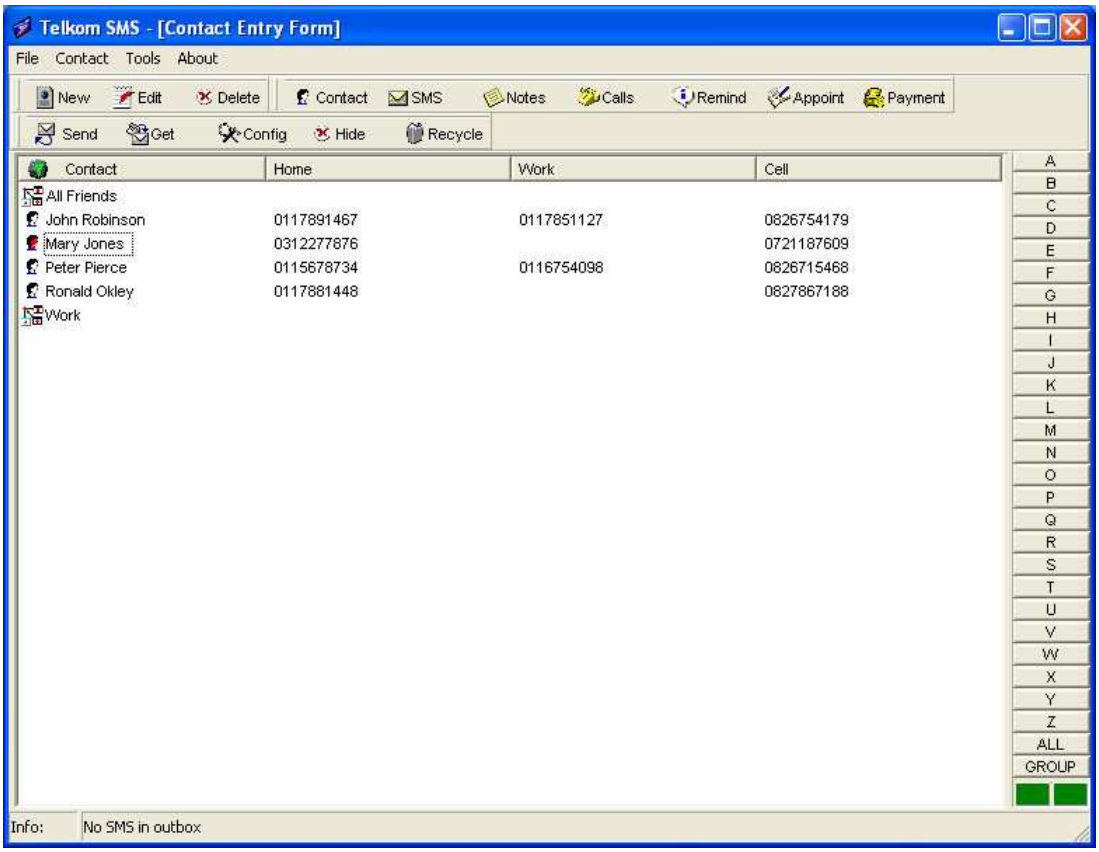
Title - will insert the title of the recipient as entered in contacts
Firstname - will insert the first name of the recipient as entered in contacts
Lastname - will insert the last name of the recipient as entered in contacts
Appointment Date - will insert the cancellation date as entered in reminder
Consultant - will insert the consultant name as entered in reminder

For example, if you click the **[Title]** button, the text <TITLE> will be inserted into the text field.

When the message is transmitted, <TITLE> will be substituted for the title of the contact to which the SMS is being sent.

9 CONTACTS LIST

Click on **[Contact]** (Taskbar or Sidebar) to display the contacts list screen.


Telkom SMS - [Contact Entry Form]
File Contact Tools About
New Edit Delete Contact SMS Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle
Contact Home Work Cell
All Friends
John Robinson 0117891467 0117851127 0826754179
Mary Jones 0312277876 0721187609
Peter Pierce 0115678734 0116754098 0826715468
Ronald Okley 0117881448 0827867188
Work
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
Info: No SMS in outbox

This icon indicates contacts with a default SMS number defined

This icon indicates contacts with no default SMS number defined

This icon indicated a distribution list (collection of contacts)

9.1 Adding Distribution Lists

Distribution Lists can be configured on the system.

Contacts can then be allocated to lists to facilitate contact filters, for sending Bulk SMS's or sending SMS's to all the recipients contained within a Distribution List.

The following form will be displayed.

Type in the required group name and save.

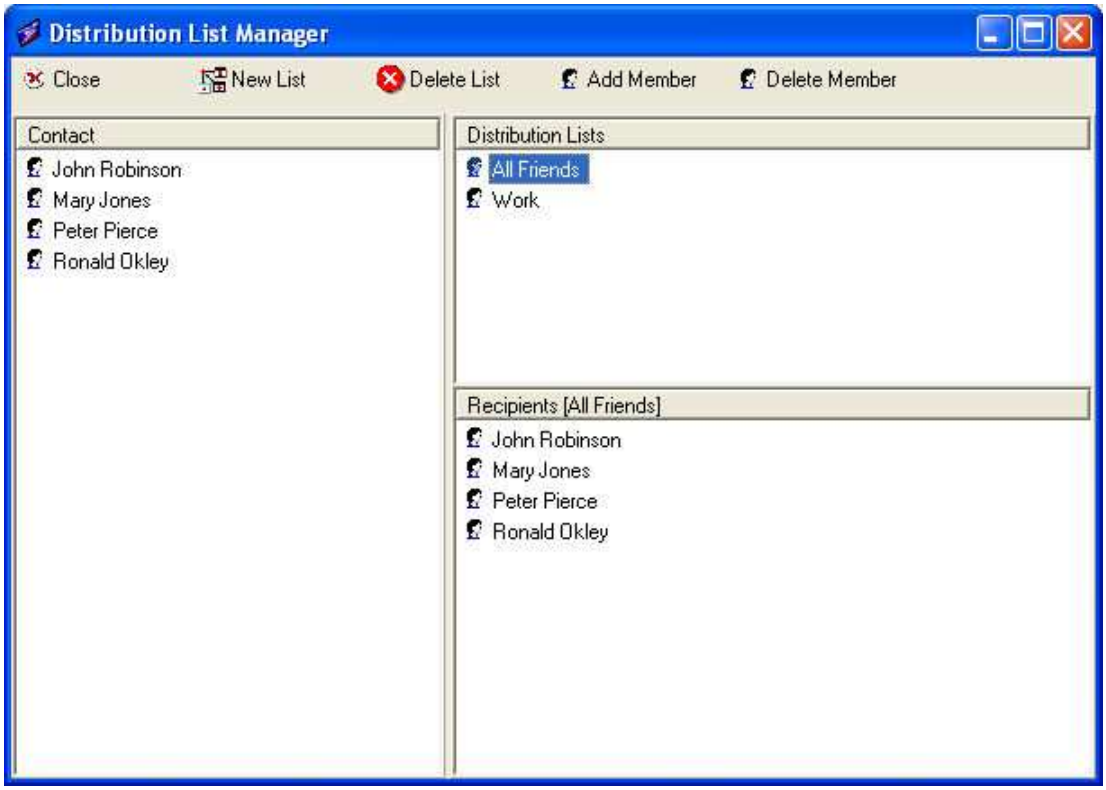
Distribution lists are displayed along side normal contacts in the Contacts List.

9.2 Distribution Lists

Distribution Lists can be configured on the system. Contacts can then be allocated to lists to facilitate contact filters, for sending Bulk SMS's or sending SMS's to all the recipients contained within a Distribution List.

To display the Distribution List form, using the File Menu select **Tools, Distribution Lists**.

Alternatively, double click on an existing Distribution List in the Contacts List.



The form provides the following features:

To view which contacts are contained within a Distribution List, click on the item in the *Distribution Lists* list. The contacts will be listed in the *Recipients* list.

To add a contact to a list, select the required list (as above) and drag and drop the contact from the *Contacts* list to the *Recipients* list. Alternatively click on the **[Add Member]** button to activate this function.

To add a new Distribution List, right click on the Group list to active the Popup Menu and select 'Add Group'. Alternatively click on the **[New List]** button to activate this function.

The new Distribution List form will be displayed. Type in the name of the new list required.

To remove a Distribution List, right click on the Distribution List and select ‘Remove Group’. Alternatively click on the **[Delete List]** button to activate this function.

To remove a contact from a Distribution List, right click on the contact in the *Recipients* list and select ‘Remove Recipient’. Alternatively click on the **[Delete Member]** button to activate this function.

Contacts can be edited or created using the Popup Menu activated by right clicking on Contact list.

9.3 Adding Contacts

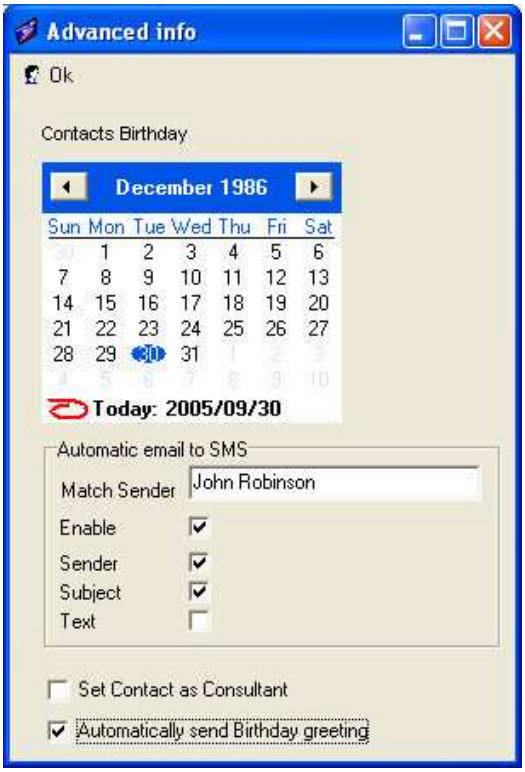
To display the New Contact form, select **New** using the File Menu, Task Bar or Popup Menu

Enter in the new contact details.

Use the **SMS checkbox's** (to the right of the numbers) to select the default SMS number for the contact. This will be the number used when contacts are assigned as recipients to normal or bulk SMS's.

Click the **[SAVE]** button to save the contact details.
Click the **[CANCEL]** button to cancel the operation.

To set advanced contact details click on the **[Advanced]** button on the tool bar. The following form will be displayed.



Use the birthday calendar to record contact or customer birthdays. If the **Automatically send Birthday greeting checkbox** is enabled, the system will automatically send out a birthday greeting on the customers birthday. Please refer to the Birthday Message definition

Use the **Set Contact as Consultant checkbox** to mark the contact as a consultant. A consultant is a contact entry that is used by the Appointment Manager, as appointments can be made with consultants.

Enable Email to SMS if you require emails received from this contact to be automatically translated to SMS's. The content of the SMS can be determined by setting the **Sender**, **Subject** and **Text** checkbox's. Please note that this function needs to be globally enabled in the System Configuration first.

To match the email sender to the contact defined in Easy SMS, type in the sender name (as viewed in Microsoft Outllook inbox) into the **'Match Sender'** text box.

9.4 Editing Contacts

Highlight the contact you wish to edit by clicking on the contact's name in the contact list.

To display the Edit Contact form, select **Edit** using the File Menu, Task Bar or Popup Menu

Alternatively, double clicking on the contact will also invoke the Edit Contact form.

Edit the details and press

[SAVE] to save the changes, or
[CANCEL] to discard any changes made.

9.5 Deleting Contacts

Highlight the contact you wish to delete by clicking on the contacts name in the contact list.

To delete the contact, select **Delete** using the File Menu, Task Bar or Popup Menu. In addition, the Del key can be used.

Multiple contact deletes are also possible by selecting a range of contacts.

Note: When Contacts are deleted, they are still retained within the system database. These *deleted* items can be viewed in the Contacts Recycle Bin.

9.6 Adding a Contact Note

Highlight the contact you wish to add a note to by clicking on the contact's name in the contact list.

Using the File Menu, select **Tools, Add Note**

The Contact Note form will be displayed.

Type the note and press

[SAVE] to save the note, or
[CANCEL] to cancel the note entry.
[PRINT] to print the note entry.

The note will be displayed and referenced to the selected contact in the Note List.

9.7 Sending an SMS from the Contacts List

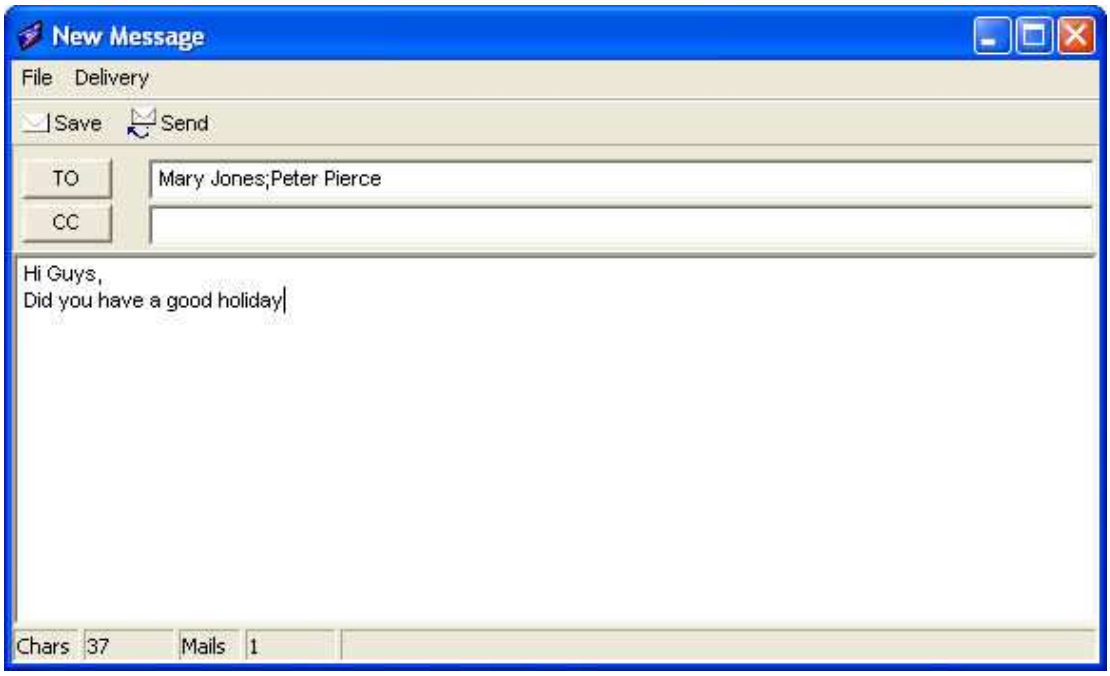
Highlight the contact you wish to send an SMS to by clicking on the contacts name in the contact list.

To create an SMS, select **SEND SMS** using the File Menu select **Tools, Send SMS** or use the list Popup Menu.

Multiple SMS recipients are also possible by selecting a range of contacts.

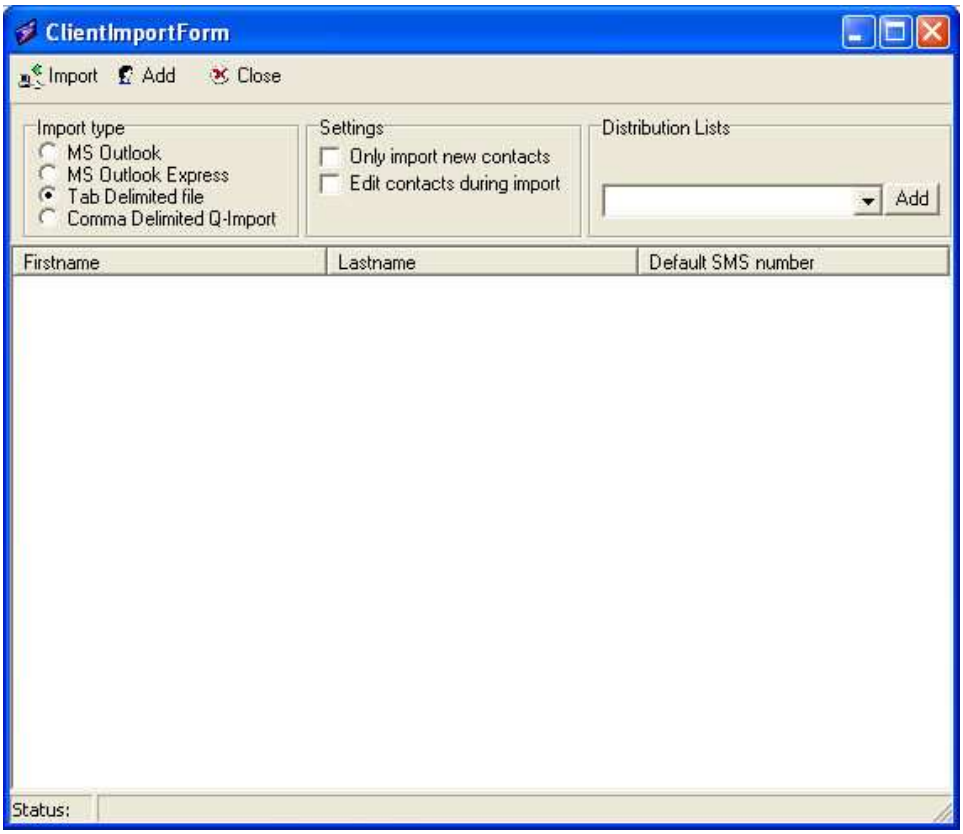
Distribution lists may also be included in the recipients selected.

The SMS form will be displayed with the selected recipients as shown below.



9.8 Importing Contacts

To display the Contact Import Form, using the File Menu select **Tools, Import Contacts**. The following form will be displayed.

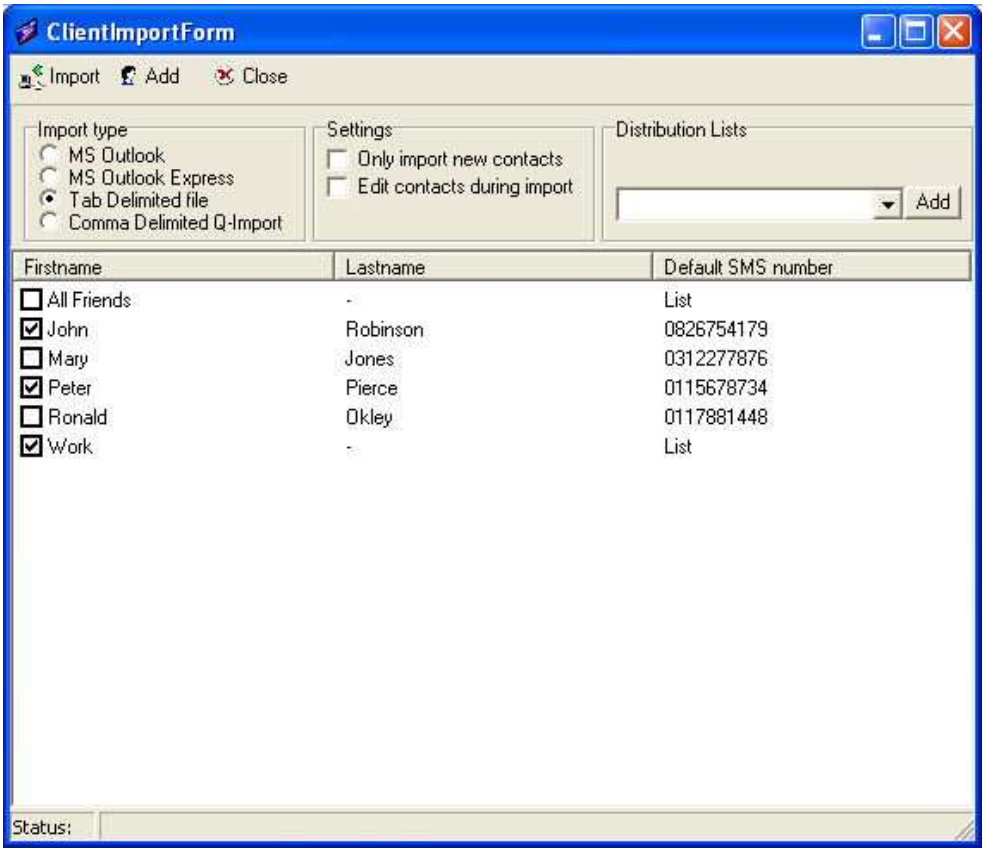


Currently the system can import from Microsoft Outlook, exported Tab Delimited text Files or Comma Delimited Quick Import files.

Select method required and click on the [Import] button.

If you wish to only import contacts that do not exist in the system already, select the 'Only import new contacts' option.

The available contacts will now be selected.



Imported contacts will be displayed. Check the contacts that you wish to add to the system database (by clicking on the checkbox next to the contact name) and click on the [Add] button to add the clients to the database.

To select or unselect all listed contacts, right click on the list to active the Popup Menu.

If you wish to edit the contact information during the import process, select the 'Edit contacts during import' option.

If importing from Microsoft Outlook and you have set up some distribution lists in Outlook, these will be listed in the Distribution list drop down box after you have imported. Select the list(s) you wish to import and click on the [Add] button next to the drop down box to automatically create the list.

Note: Only do this once you have added the imported contacts

Related information:

Tab Delimited text file format
Comma Delimited Quick Import file format

9.8.1 Tab Delimited text file format

General information:

- tab delimited file (ie: tabs inserted between fields)
- insert space to substitute for any field omitted
- birthday in you PC standard date format
- smsnumber is the default number for SMS's and is one of (work, home, cell)

Import file structure in this order:

lastName
firstName
birthDay
jobTitle
company
addrStreet
addrCity
addrProvince
addrCountry
addrPostalCode
telHome
telWork
telFax
telCell
email
smsNumber

Each entry line will therefore consist of:

LastName**t**firstName**t**birthDay**t**jobTitle**t**company**t**addrStreet …..
tsmsNumber**n**

Where **t** represents the tab and **n** represents the carriage return at the end of the line.

Note: Contacts exported from the system will be stored in this format.

9.8.2 Comma Delimited Quick Import file format

General info:

- comma delimited file (ie: comma's inserted between fields)
- insert space to substitute for any field omitted
- birthday in you PC standard date format
- cell number is the default number for SMS's

Import file structure in this order:

lastName
firstName
telCell

Each entry line will therefore consist of:

firstName**,**lastName**,**telCell**n**

Where **n** represents the carriage return at the end of the line.

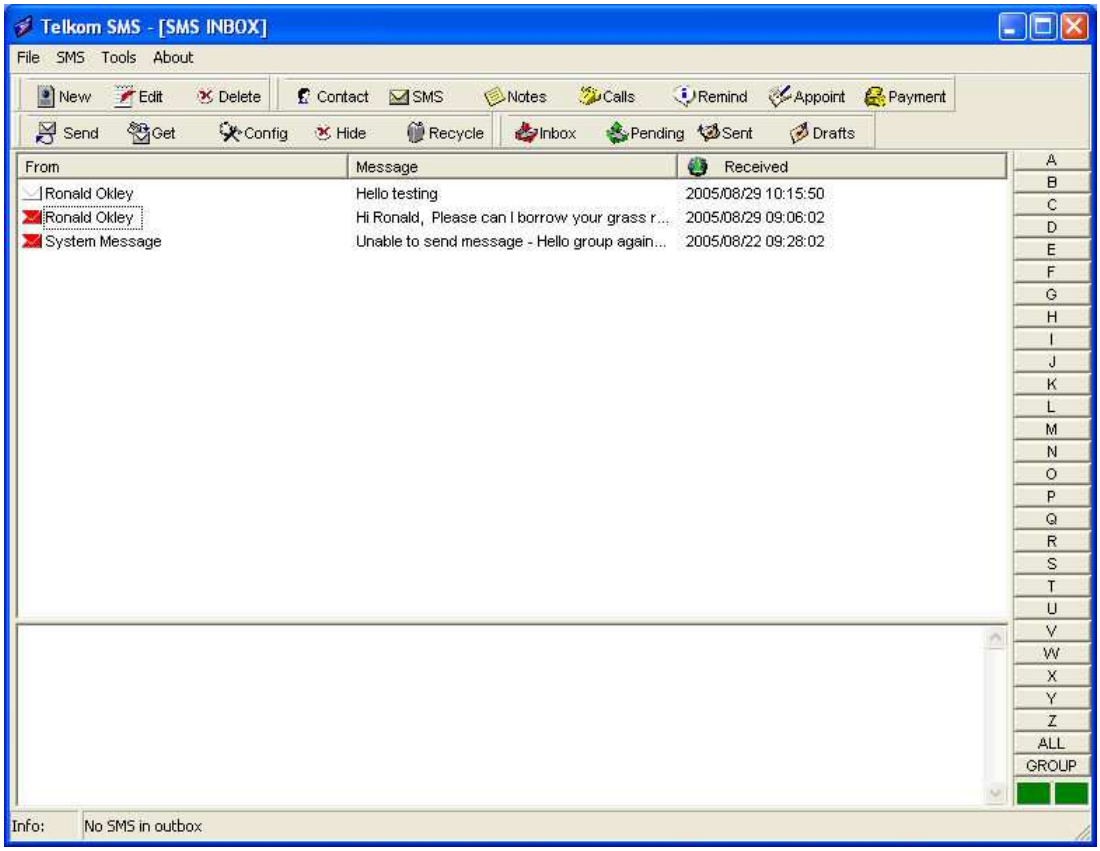
10 SMS'S

SMS's are handled in a similar fashion to the way that emails are generally handled. The SMS's are stored in a number of mailboxes, namely:

Inbox – received SMS's
Pending - SMS's pending sending to the Telkom SMS Server
Sent - SMS's that have been submitted to the Telkom SMS Server
Draft - Saved SMS's.

Click on **[SMS]** button (Taskbar or Sidebar) to display the SMS Inbox list screen.

Click on **[Inbox]**, **[Pending]**, **[Sent]** or **[Drafts]** button (SMS taskbar or Sidebar) to display the SMS list required.


Telkom SMS - [SMS INBOX]
File SMS Tools About
New Edit Delete Contact SMS Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle Inbox Pending Sent Drafts
From Message Received
Ronald Okley Hello testing 2005/08/29 10:15:50
Ronald Okley Hi Ronald, Please can I borrow your grass r... 2005/08/29 09:06:02
System Message Unable to send message - Hello group again... 2005/08/22 09:28:02
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
Info: No SMS in outbox

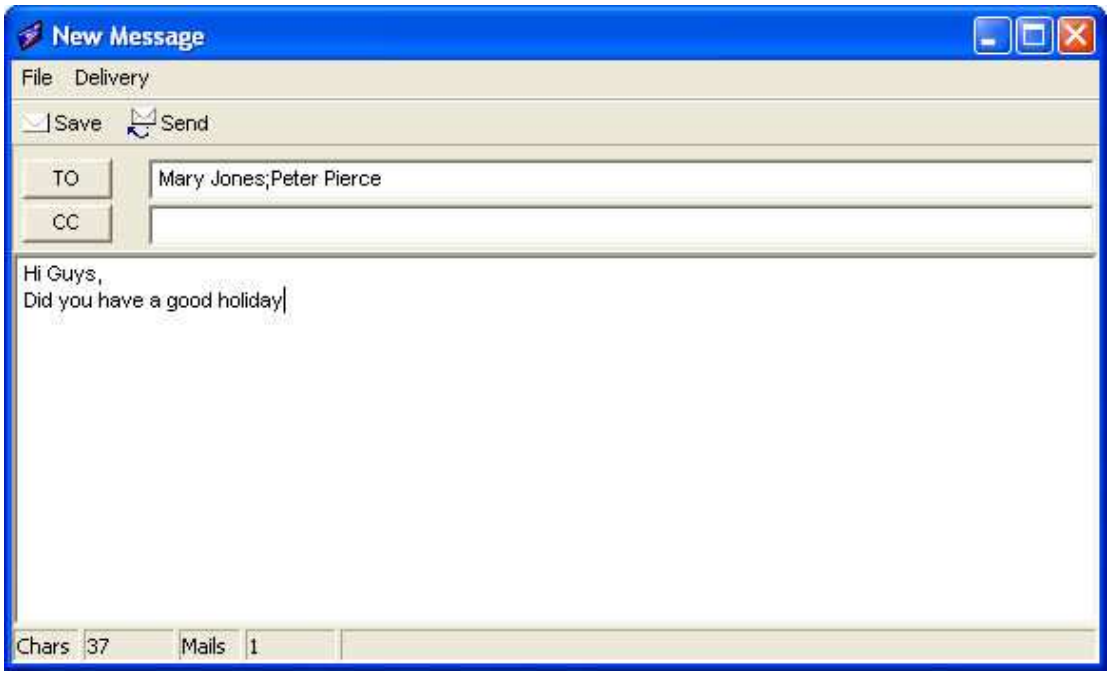
Indicates SMS's that have been read

Indicates SMS's that have not been read

When a new SMS is received, the **[SMS]** button on the Taskbar will flash from yellow to red to alert that a new message has been received.

10.1 Creating a New SMS

Using the Taskbar or Popup Menu click on **New** to create a new SMS. Alternatively use the File Menu selecting **SMS, New**. The following form will be displayed:



Add the SMS text into the text box. (Note that SMS's that are longer than 160 characters will be transmitted as multiple SMS's)

Click on the Send button to send the SMS. The message will be stored in the Pending Box until submitted for transmission.

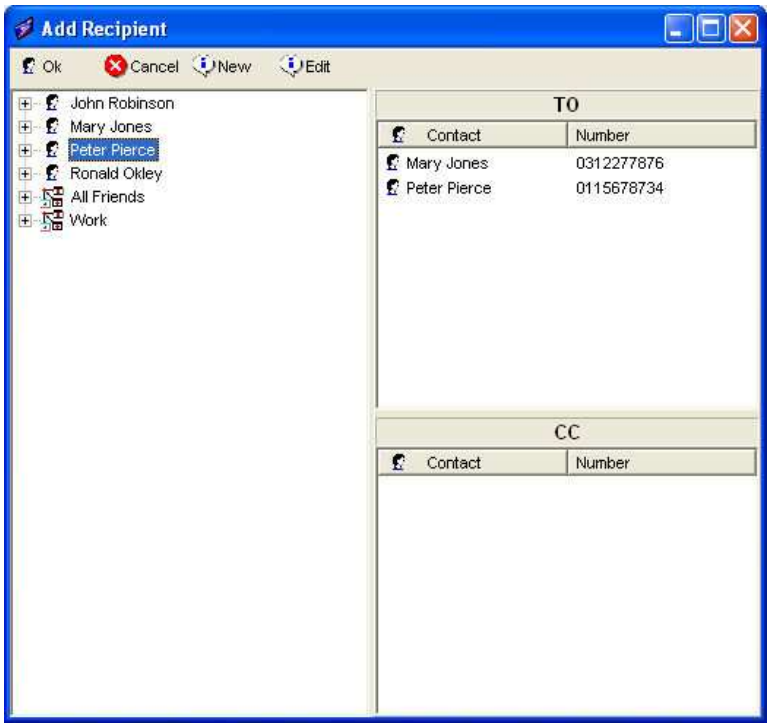
Click on the Save button to save the message in Drafts. Draft messages can be edited and sent at a later date as required.

Click on the TO or CC buttons to add SMS recipients

Note: Recipients in TO or CC lists must be separated by semi-colons. Numbers may be typed directly into the TO or CC list.

10.2 Adding Recipients to SMS's

The following form will be displayed:



Drag and Drop the contacts to the relevant list and select **[Ok]** when complete. Please note that the default SMS number will be used if the name is dragged.

To use another contact number (besides the default SMS number), expand the contact in the left list (by clicking on the +) and drag the relevant number to the TO or CC list.

To add a new contact while selecting recipients, click on the **[New]** button, which will display the new contact form.

To edit a contact while selecting recipients, click on the **[Edit]** button, which will display the edit contact form.

To remove a recipient from the TO or CC lists right click on the recipient to activate the Popup Menu and select '**Remove**'.

10.3 Editing an SMS

Only SMS's that are in the Draft list can be edited.

Select the SMS that you wish to edit in the SMS list and click on the **[Edit]** button on the Taskbar. Alternatively right click on the list item and use the Popup Menu or File Menu selecting **SMS, Edit**.

Using the same procedure as creating a New SMS, you can edit the SMS and send or re-save it.

10.4 Deleting an SMS

Select the SMS that you wish to delete in the SMS list and click on the **[Delete]** button on the Taskbar. Alternatively right click on the list item and use the Popup Menu. File Menu or press the **Del** key on the keyboard

Multiple SMS deletes are also possible by selecting a range of contacts.

Note: When SMS's are deleted, they are still retained within the system database. These *deleted* items can be viewed in the SMS Recycle Bin.

10.5 Replying to or Forwarding an SMS

Select the SMS that you wish to reply to or forward in the SMS list and using the File Menu selecting **SMS, Forward** or **SMS, Reply** or right click to active the list Popup Menu.

The SMS form will be displayed, including the text from the original SMS.

Using the same procedure as creating a New SMS, you can edit the SMS and send or re-save it.

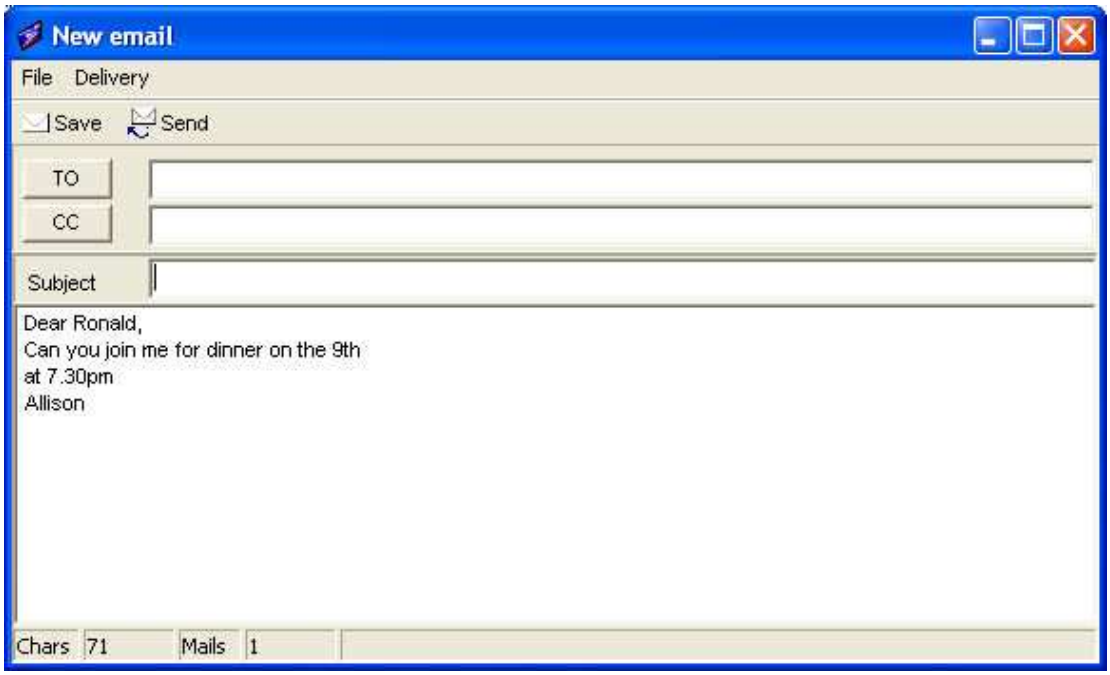
Alternatively, double click on the SMS and the following form will be displayed:

Click on the **[Reply]** or **[Forward]** buttons to reply to or forward the SMS.

10.6 Converting an SMS to an email

Right click on the SMS that you wish to convert to an email in the SMS list and using the Popup Menu select **Send as email.**

The email form will be displayed, including the text from the SMS.



Select the email recipients you wish to include, type in the email subject and select **[Send]** to send the email, or **[Save]** to save the email.

(Note: In order for the email function to operate, Microsoft Outlook must be installed on the computer and the email function enabled in the Setup Configuration)

10.7 Creating a Bulk SMS

To display the Bulk SMS form, use the File Menu selecting **Tools, Bulk SMS**.

The following form will be displayed:

Right click on the groups list to active the Popup Menu to select either a group or recipient view.

Drag and drop the group/recipient to the recipients list to add recipients for the bulk SMS.

Click on the **'Personalise bulk mail'** checkbox if you wish to personalise the SMS's sent to each recipient

Three buttons are available on the right hand side of the text box. These allow you to customise the text that will be displayed in the SMS sent to the SMS recipient.

Title - will insert the title of the recipient as entered under the contacts
Firstname - will insert the first name of the recipient as entered in contacts
Lastname - will insert the last name of the recipient as entered in contacts

For example, if you click on the **[Title]** button the text <TITLE> will be inserted into the text field. When the message is transmitted, <TITLE> will be substituted for the title of the contact to which the SMS is being sent.

Type in the text you wish to include in the SMS.

Click on the **[Send]** Button to send the bulk SMS or click on **[Cancel]** to abort the bulk SMS.

Note: Bulk SMS's are restricted in length to 160 characters. SMS's longer than this length will not be divided into multiple SMS's.

11 EMAIL FORM

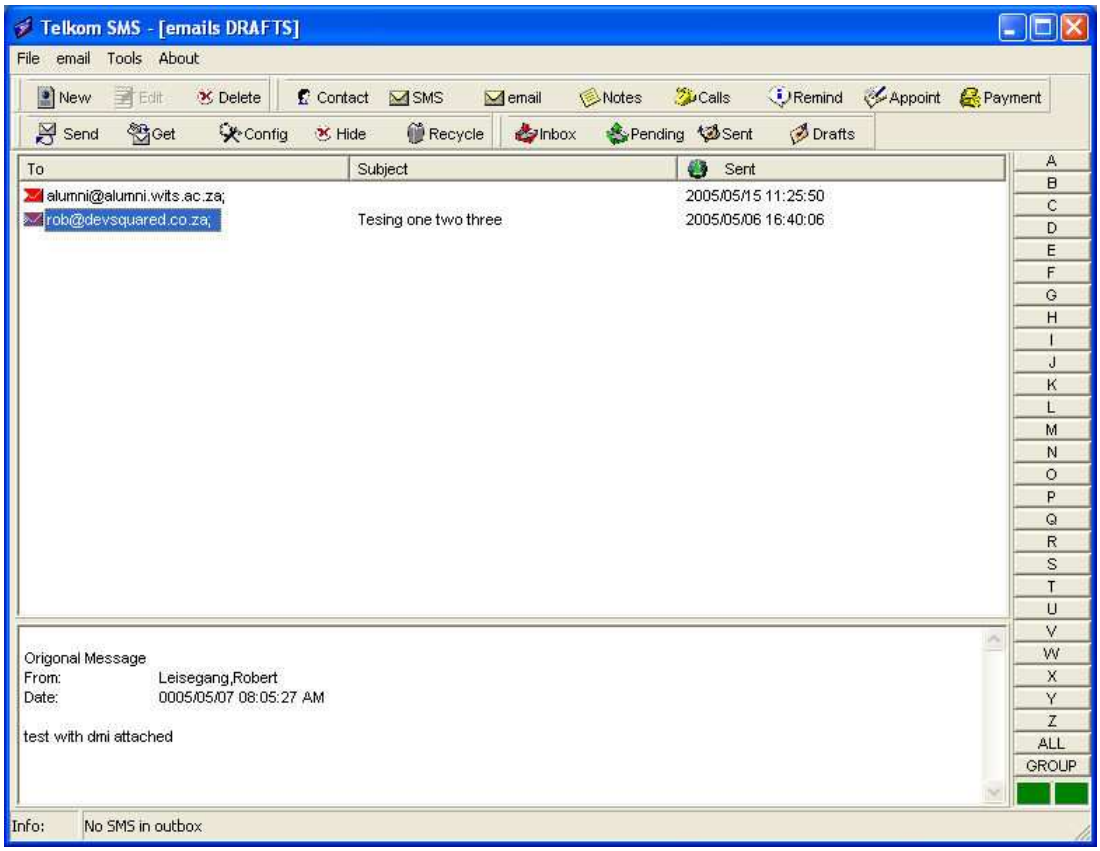
In order for the email function to operate, Microsoft Outlook must be installed on the computer

The Telkom Easy SMS application can view emails stored in Microsoft Outlook, displaying the following mailboxes

INBOX
PENDING (Outbox)
SENT
DRAFTS

Click on **[email]** button (Taskbar or Sidebar) to display the list of emails.

Click on **[Inbox]**, **[Pending]**, **[Sent]** or **[Drafts]** button (email taskbar or Sidebar) to display the email list required.


Telkom SMS - [emails DRAFTS]
File email Tools About
New Edit Delete Contact SMS email Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle Inbox Pending Sent Drafts
To Subject Sent
alumni@alumni.wits.ac.za; 2005/05/15 11:25:50
rob@devsquared.co.za; Tesing one two three 2005/05/06 16:40:06
Origonal Message
From: Leisegang,Robert
Date: 0005/05/07 08:05:27 AM
test with dmi attached
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
Info: No SMS in outbox

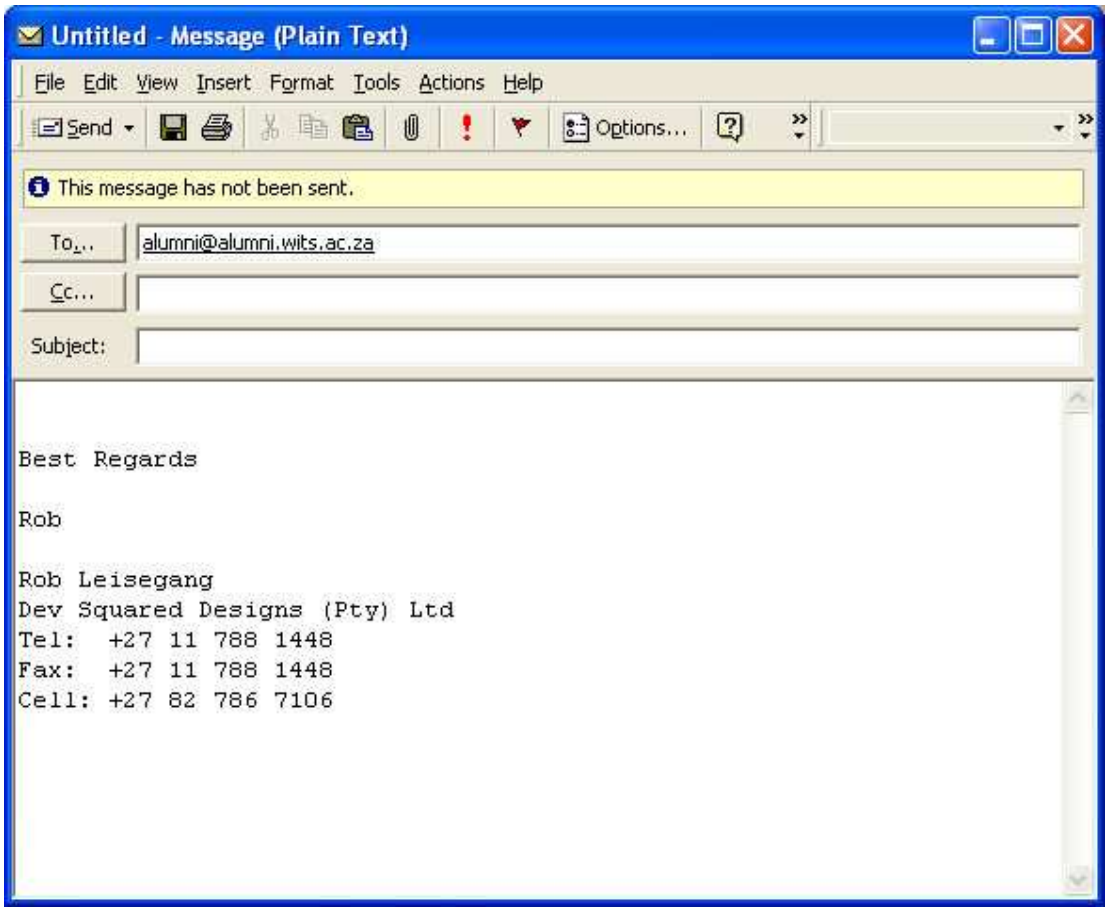
Indicates emails that have been read

Indicates emails that have not been read

11.1 Viewing an email

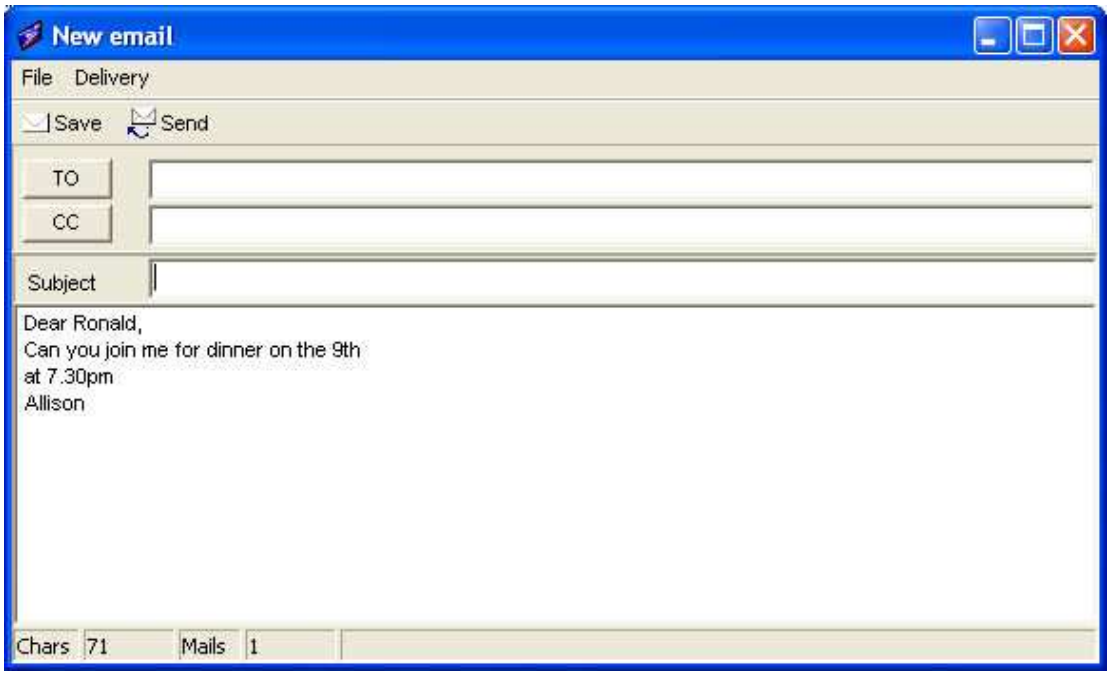
Click on the email you wish to view. The email will be displayed in the text box on the bottom of the screen.

Double clicking on the email you wish to view will display the Microsoft Outlook email form. The email can be viewed, replied to or forwarded as required.



11.2 Creating a New email

Using the Taskbar or Popup Menu click on **New** to create a new email. Alternatively use the File Menu selecting **email, New**. The following form will be displayed:



Add the email text into the text box.

Click on the Send button to send the email. The message will be stored in the Pending Box until submitted for transmission.

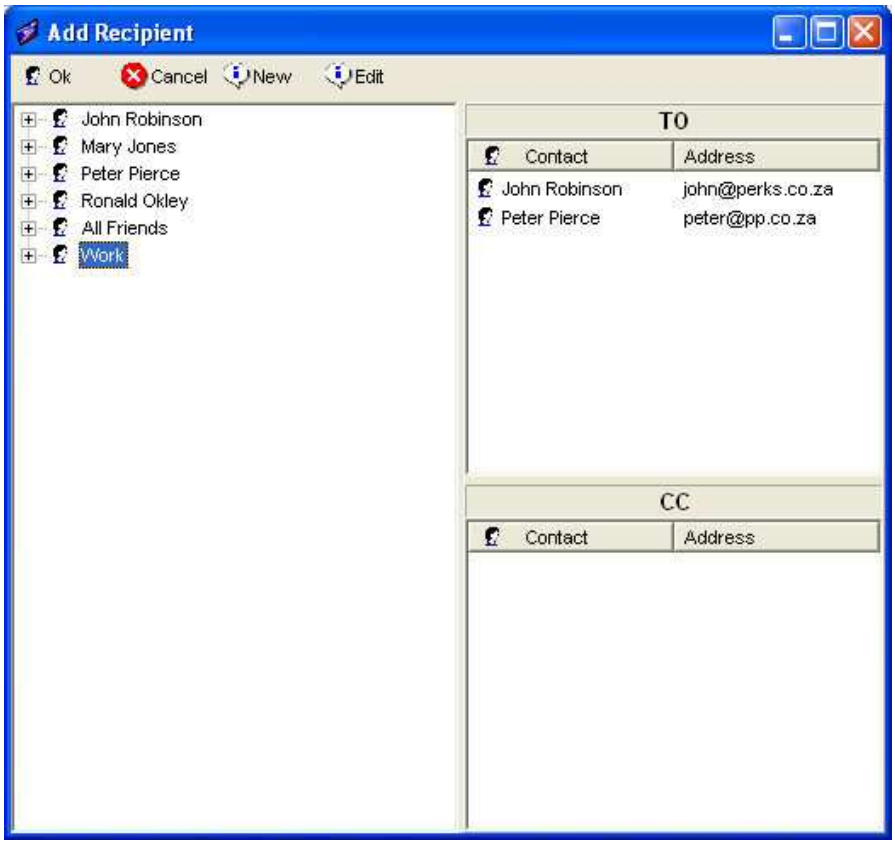
Click on the Save button to save the message in Drafts. Draft messages can be edited and sent at a later date as required.

Click on the TO or CC buttons to add email recipients

Note: Recipients in TO or CC lists must be separated by semi-colons. Addresses may be typed directly into the TO or CC list.

11.3 Adding Recipients to emails

The following form will be displayed:



Drag and Drop the contacts to the relevant list and select **[Ok]** when complete. The recipients email address will be inserted.

To add a new contact while selecting recipients, click on the **[New]** button, which will display the new contact form.

To edit a contact while selecting recipients, click on the **[Edit]** button, which will display the edit contact form.

To remove a recipient from the TO or CC lists right click on the recipient to activate the Popup Menu and select '**Remove**'.

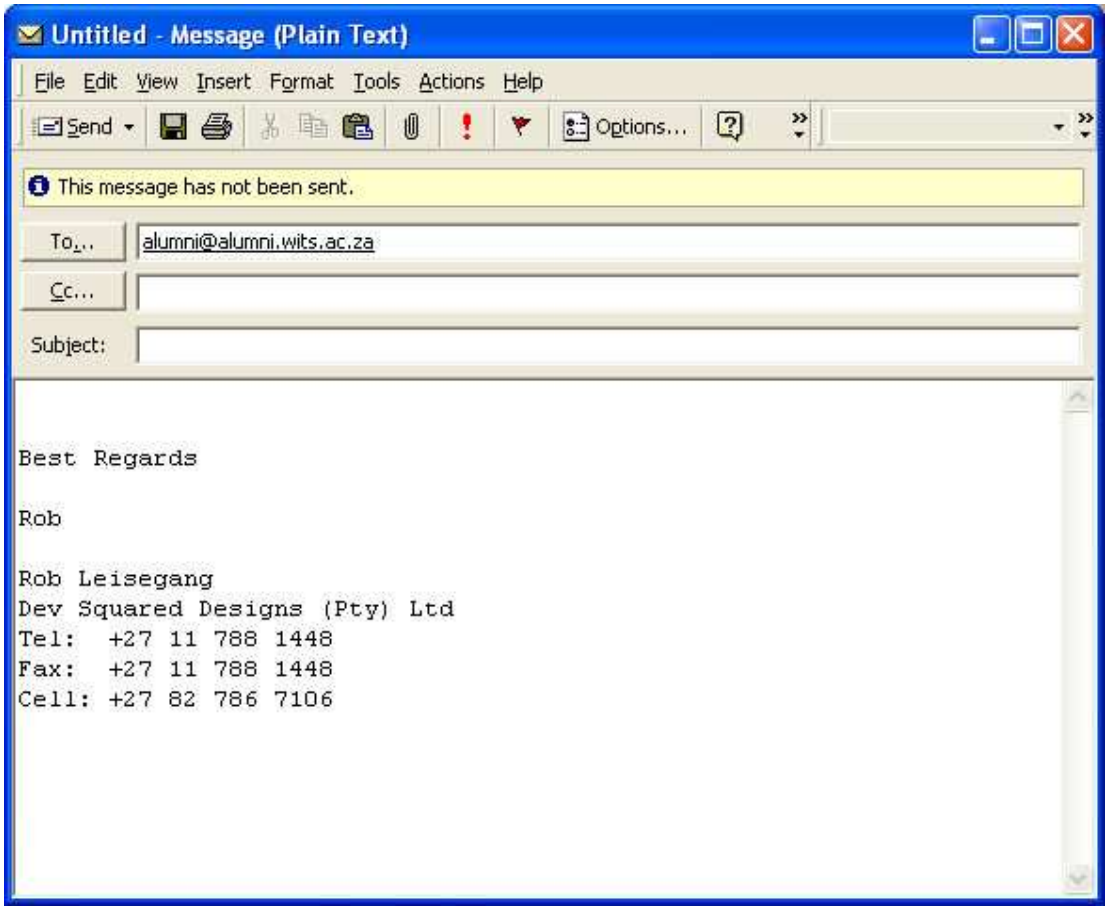
11.4 Deleting an email

Select the email that you wish to delete in the email list and click on the **[Delete]** button on the Taskbar. Alternatively right click on the list item and use the Popup Menu. File Menu or press the **Del** key on the keyboard

Multiple email deletes are also possible by selecting a range of contacts.

11.5 Replying to or Forwarding an SMS

Double clicking on the email you wish to view will display the Microsoft Outlook email form. The email can be viewed, replied to or forwarded as required.



11.6 Converting an email to an SMS

Select the email you wish to convert from the Inbox list and right click to activate the Popup Menu or File Menu selecting **Tools, Send as SMS**.

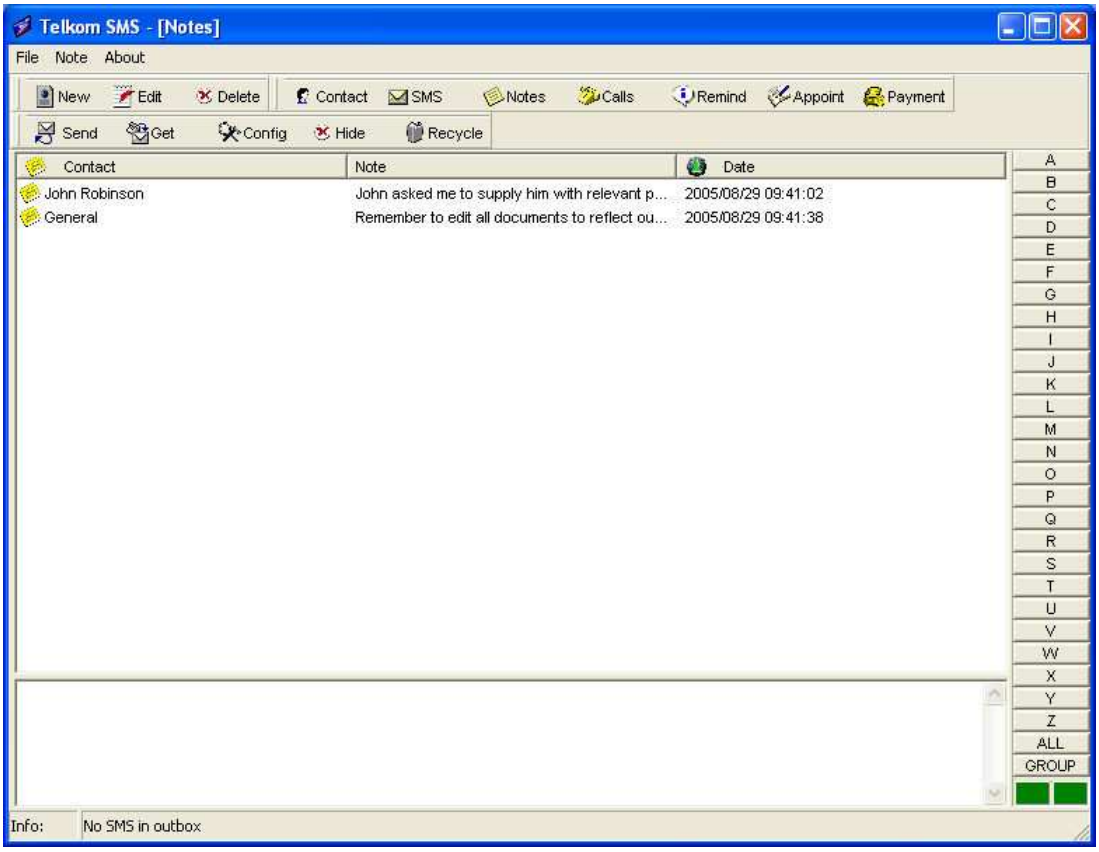
Using the same procedure as creating a New SMS, you can edit the SMS and send or re-save it.

12 NOTES

Notes can be used to store information about clients. Notes can be added from:

the Contacts List Note
the Notes List
the Call Information Form
the Appointment Manager

Click on the **Notes** button on the (Taskbar or Sidebar) to display the list of notes:


Telkom SMS - [Notes]
File Note About
New Edit Delete Contact SMS Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle
Contact Note Date
John Robinson John asked me to supply him with relevant p... 2005/08/29 09:41:02
General Remember to edit all documents to reflect ou... 2005/08/29 09:41:38
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
Info: No SMS in outbox

12.1 Adding a general note

Using the Taskbar or Popup Menu click on **New** to create a new Note. Alternatively use the File Menu selecting **Note, New**.

The following form will be displayed.

Type in the note you require and click on **[SAVE]** to save the note.

The note can be printed by clicking on the **[PRINT]** button.

Notes that are created in this manner will not be referenced to a contact but will be saved as a general note.

To reference a note to a contact, use the Contacts List Note

12.2 Viewing a Note

Click on the note you wish to view. The note will be displayed in the text box on the bottom of the screen.

12.3 Editing a Note

To edit a Note, select **Edit** using the File Menu, Task Bar or Popup Menu.

Edit the text as required.

12.4 Deleting a note

Select the note that you wish to delete in the note list and click on the **[Delete]** button on the Taskbar. Alternatively right click on the list item and use the Popup Menu. File Menu or press the **Del** key on the keyboard

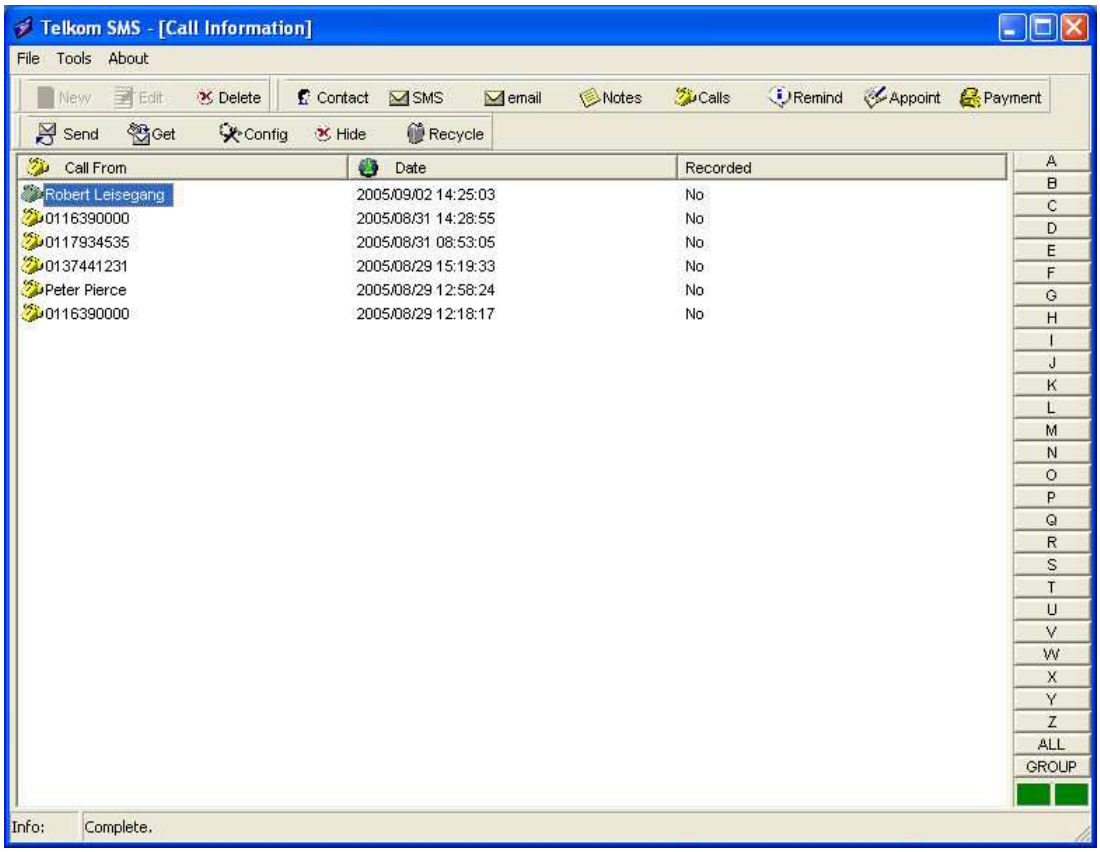
Multiple note deletes are also possible by selecting a range of contacts.

Note: When notes are deleted, they are still retained within the system database. These *deleted* items can be viewed in the Notes Recycle Bin.

13 CALLS

The Telkom Easy SMS system can identify and log incoming calls. To view a list of incoming calls, click on **[Calls]** button using the (Taskbar or Sidebar) to display the list of calls received.

The following form will be displayed:


Telkom SMS - [Call Information]
File Tools About
New Edit Delete Contact SMS email Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle
Call From Date Recorded
Robert Leisegang 2005/09/02 14:25:03 No
0116390000 2005/08/31 14:28:55 No
0117934535 2005/08/31 08:53:05 No
0137441231 2005/08/29 15:19:33 No
Peter Pierce 2005/08/29 12:58:24 No
0116390000 2005/08/29 12:18:17 No
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
Info: Complete.

To playback a recorded call, select the call and use the **Tools, Play** option on the File Menu.

To stop the playback, use the **Tools, Stop** option on the File Menu.

13.1 Recording an outgoing Call

Select the **Tools, Record** option on the File Menu and the following form will be displayed:

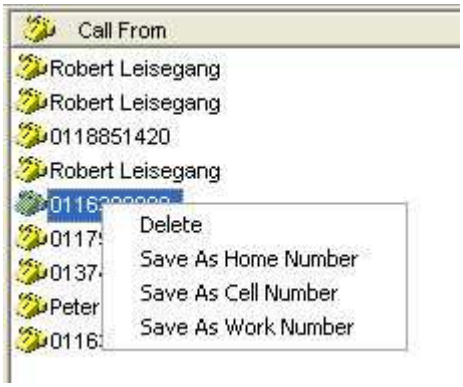
Type in the dialled number and use the record and stop buttons to control the recording.

13.2 Adding or Editing unresolved Contacts

If a call is received and the calling number cannot be resolved with an existing contact number, the caller number will be displayed.

To add the number (and contact) to the database, right click to activate the popup menu.

The following options will be displayed:



Select the option required, and the Select Contact Form will be displayed.

If you want to add a new contact, click on the **[New]** button.

If you want to add the number to an existing contact, click on the required contact displayed, and click **[Ok]**.

13.3 Deleting a Call

Select the call that you wish to delete in the note list and click on the **[Delete]** button on the Taskbar. Alternatively right click on the list item and use the Popup Menu, File Menu or press the **Del** key on the keyboard

Multiple call deletes are also possible by selecting a range of contacts.

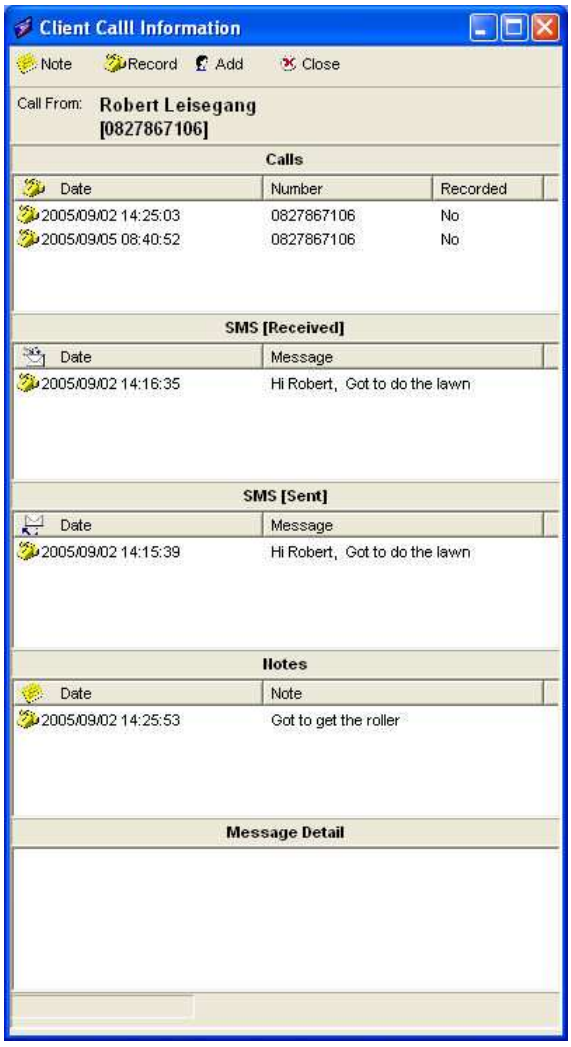
Note: When calls are deleted, they are still retained within the system database. These *deleted* items can be viewed in the Calls Recycle Bin.

14 CLIENT INFORMATION FORM

(Note: In order for this form to be displayed during calls, this function must be enabled in the Setup Configuration)

When an incoming call is detected the following call information form will be displayed.

Click the **[Close]** button to remove the form once the call is finished.



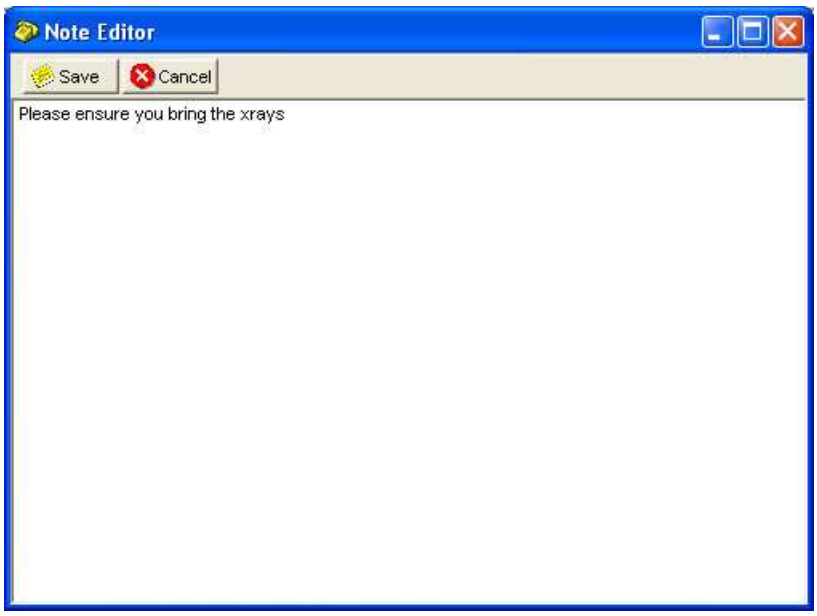
Information relevant to the client will be display and can be viewed by clicking on the item you wish to view.

Should the current caller not be identified by the system, use the **[Add]** button on the taskbar to add the new contact.

14.1 Adding a Note during a call

Click on the **[Note]** button on the Call Information Form to add a note about the call or client. The note will be referenced to the client.

The Note form will be displayed:



Type in the required information.

14.2 Recording an incoming call

The call can be recorded by clicking on the **[Record]** button while the Call Information Form is active.

14.3 Listening to a Recorded Call

Only calls that have been recorded can be played back. The recorded status of a call can be viewed in the Call List 'Recorded' column.

To playback a call, using the File Menu select **Tools, Play**.

Select **Tools, Stop** to end the playback.

14.4 Adding or Editing Contacts during a call

If a call is received and the calling number cannot be resolved with an existing contact number, the caller will be displayed as **UNKNOWN**.

To add the number (and contact) to the database, click on the **[Add]** button while the Call Information Form is active.

The following options will be displayed:

Select the option required, and the Select Contact Form will be displayed.

If you want to add a new contact, click on the **[New]** button.

If you want to add the number to an existing contact, click on the required contact displayed, and click **[Ok]**.

15 REMINDERS

Reminders are generated by the Appointment Manager (or manually) to inform clients of appointments.

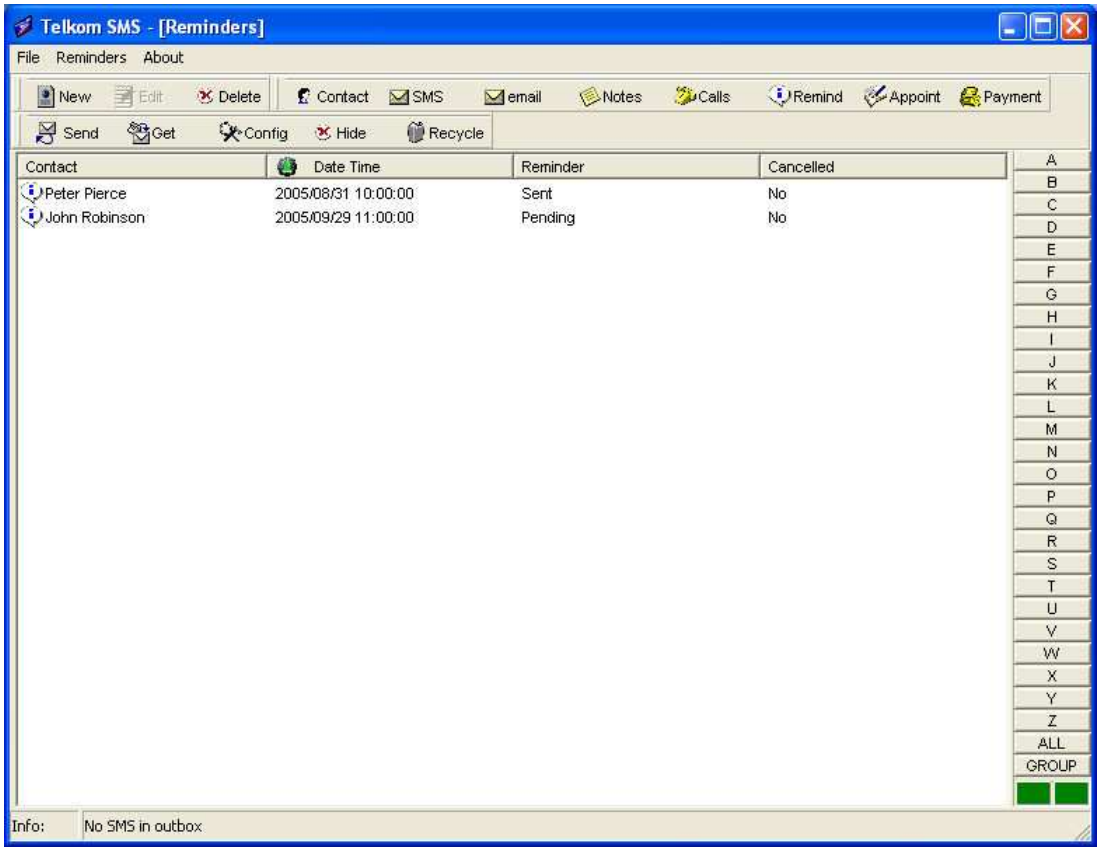
Appointment / Reminders can be scheduled in advance, and the reminder SMS's will be sent approximately 24 hours before the appointment.

Reminders (or Appointments with reminders) that are cancelled will immediately generate a cancellation SMS.

Reminders can be in on of two states:

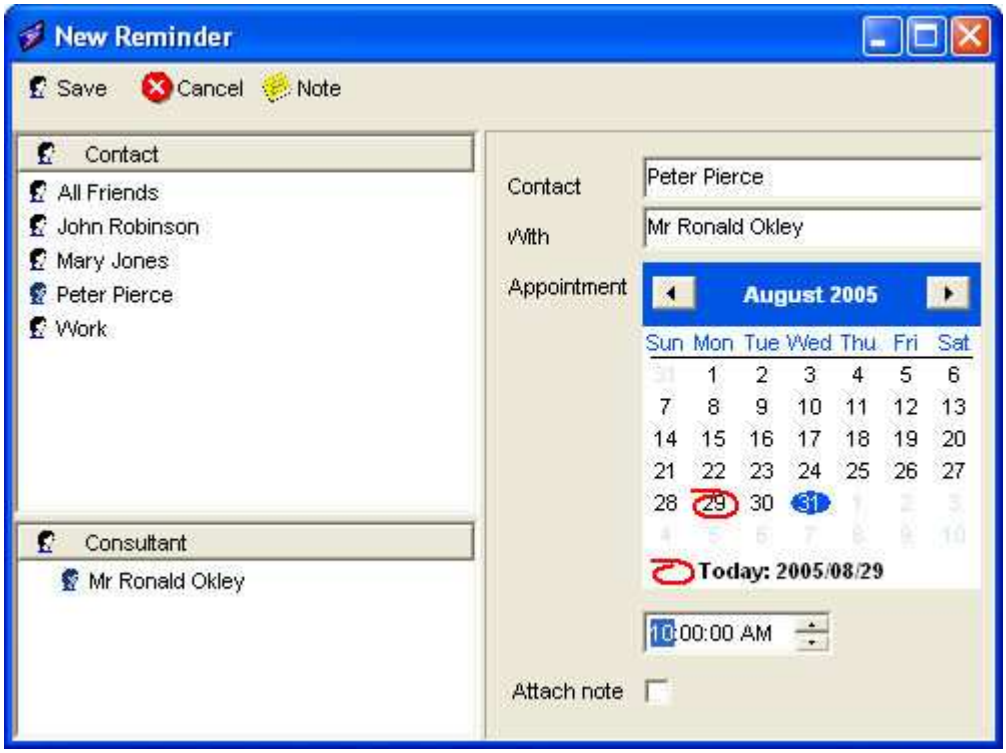
Pending	-	reminder has not yet been sent
Sent	-	reminder has been sent as an SMS

To view a list of reminders, click on the **[Remind]** button using the (Taskbar or Sidebar)



15.1 Creating a Reminder

To add a Reminder, select **New** using the File Menu, Task Bar or Popup Menu.



Select the client to whom you would like to place the reminder, the appointment date and consultant.

If you would like to attach a note to the SMS that gets sent, click on the **[Note]** button to create the note, and check the 'Attach Note' checkbox.

The SMS generated will be in the form designed using the Appointment Reminder Configuration

15.2 Cancelling a Reminder

To cancel a Reminder, select **Cancel Reminder** using the File Menu or Popup Menu.

The SMS generated will be in the form designed using the Appointment Reminder Cancellation Configuration.

15.3 Deleting a Reminder

Select the reminder that you wish to delete in the Reminder list and click on the **[Delete]** button on the Taskbar.

Alternatively right click on the list item and use the Popup Menu, File Menu or press the **Del** key on the keyboard

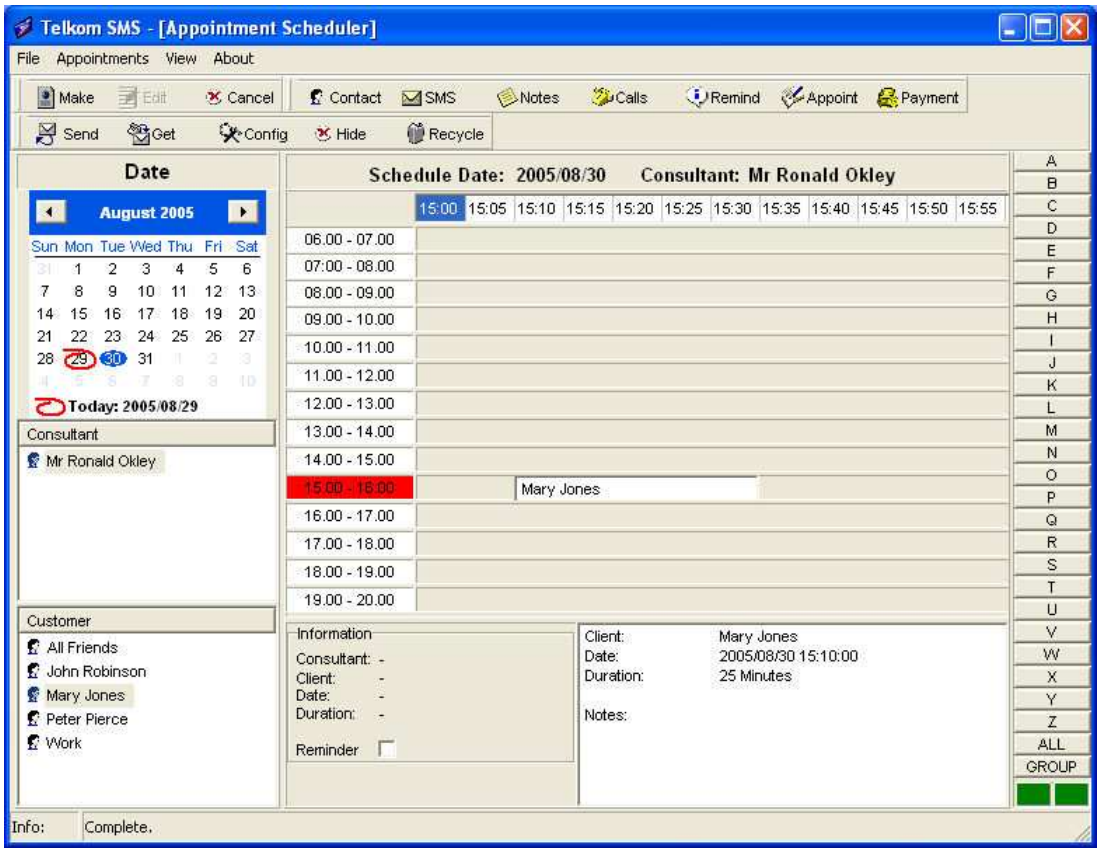
Multiple Reminder deletes are also possible by selecting a range of contacts.

No SMS is sent when a Reminder is deleted.

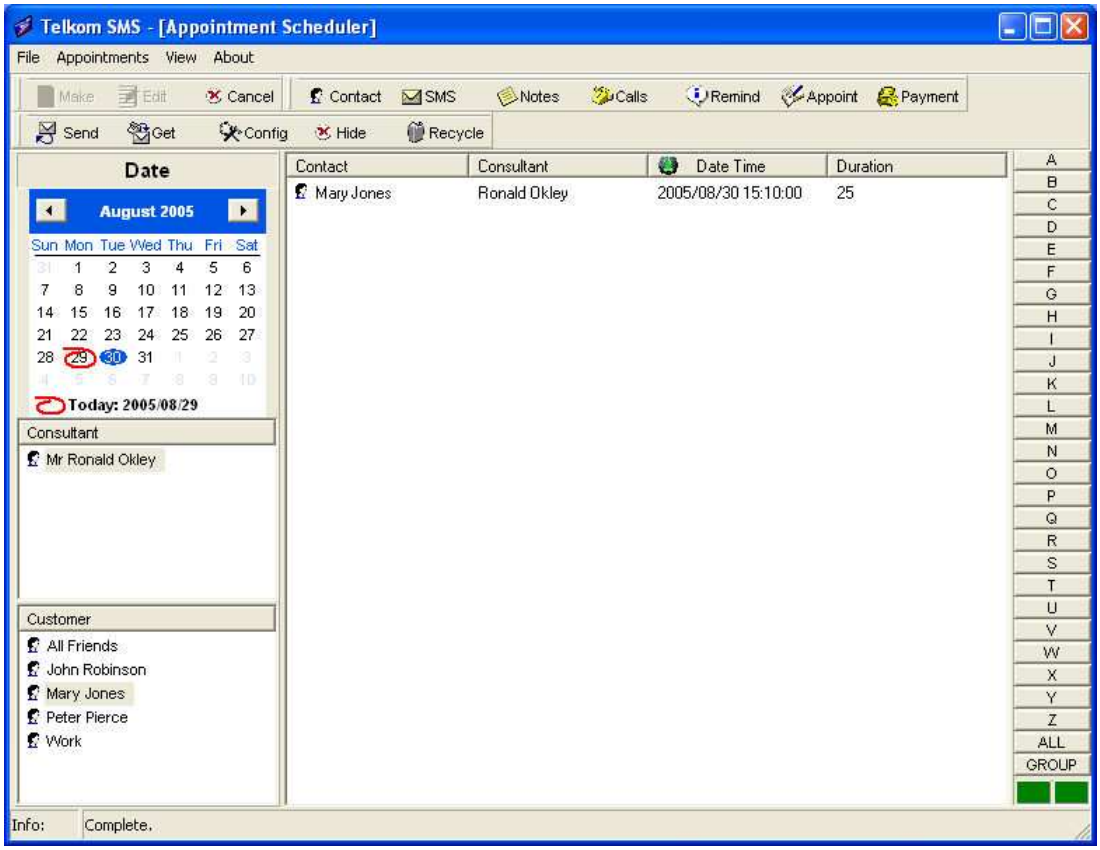
Note: When Reminders are deleted, they are still retained within the system database. These *deleted* items can be viewed in the Reminders Recycle Bin.

15.4 Appointments

Click on Appointments (Taskbar or Sidebar) to display the Appointment Manager:

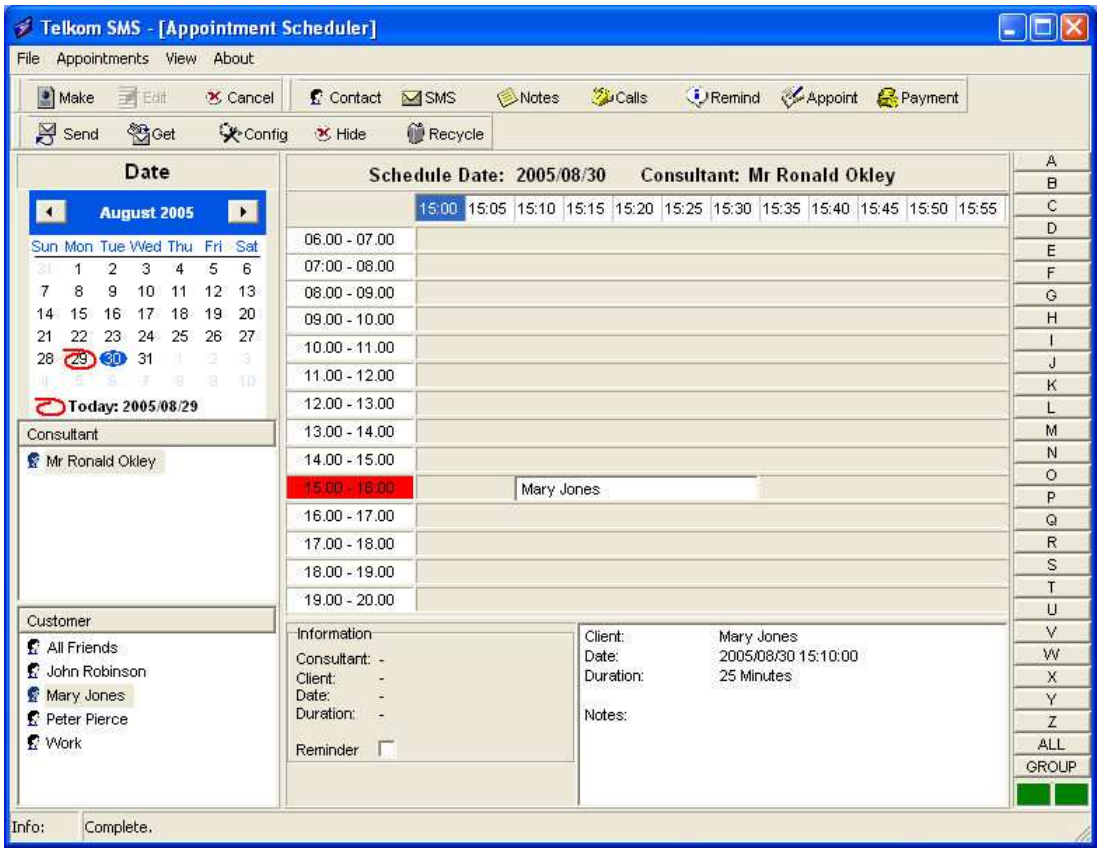


To view Appointments in list form select **View, List** using the File Menu.


Telkom SMS - [Appointment Scheduler]
File
Appointments
View
About
Make
Edit
Cancel
Contact
SMS
Notes
Calls
Remind
Appoint
Payment
Send
Get
Config
Hide
Recycle
Date
August 2005
Sun Mon Tue Wed Thu Fri Sat
Today: 2005/08/29
Consultant
Mr Ronald Okley
Customer
All Friends
John Robinson
Mary Jones
Peter Pierce
Work
Contact
Consultant
Date Time
Duration
Mary Jones
Ronald Okley
2005/08/30 15:10:00
25
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Q
R
S
T
U
V
W
X
Y
Z
ALL
GROUP
Info:
Complete.

15.5 Creating a new appointment

To create a new appointment, follow the procedure below



Select the appointment date on the calendar.

Select the consultant.

Select the customer.

Click on the hour required ie: [12.00 – 13.00]

Click on the appointment start time ie: [10:15] using the mouse. Hold down the shift key and using the right arrow button, highlight the time required.

[or , the mouse can be used to select the time / duration by clicking on the start time and while holding down the mouse button, moving the mouse to the end time required].

Press the **[Make]** button on the Taskbar.

If you require an appointment that crosses the hour boundary, first create the first part of the appointment (ie: 15:45 to 15:55). Next create the second part of the appointment (ie: 16:00 to 16:15). The system will detect that the appointments belong to the same customer and cross the hour boundary, and will ask you if you wish to

join the 2 appointments into a single appointment. Confirm the join to complete the process.

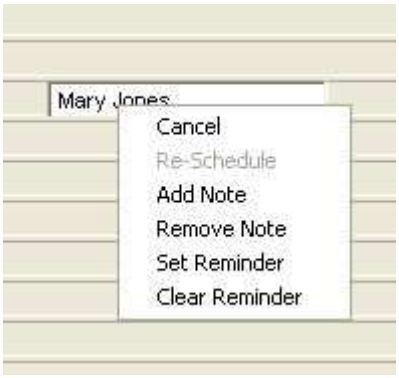
15.6 Viewing an appointment

Select the date and consultant and then click on the required appointment box.

The appointment detail will be displayed in the text box on the bottom of the screen.

15.7 Working with appointment reminders

To add a Reminder to an appointment, right click on the appointment and select **'Set Reminder'** as shown below.



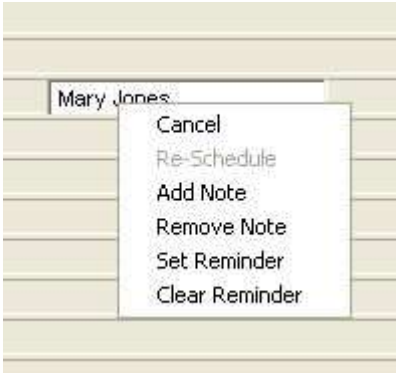
The SMS generated when the reminder matures will be in the form designed using the Appointment Reminder Configuration

To remove a Reminder, right click on the appointment and select **'Clear Reminder'.**

Reminders can be viewed in the Reminder List.

15.8 Cancelling an appointment

To cancel an appointment, right click on the appointment and select '**Cancel**' as shown below.



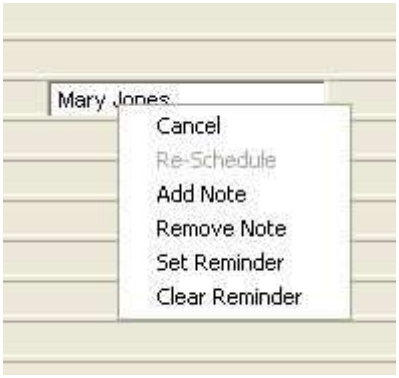
A cancellation SMS will be automatically sent. Any pending reminders for the appointment will be disabled. The SMS generated will be in the form designed using the Appointment Reminder Cancellation Configuration.

Reminders can be viewed in the Reminder List.

Note: When Appointments are cancelled, they are still retained within the system database. These *cancelled* items can be viewed in the Appointments Recycle Bin.

15.9 Working with appointment notes

To add a Note to an appointment, right click on the Appointment and select '**Add Note**' as shown below.



The New Note form will be displayed. Type in the Note required. The note will be attached to the Appointment Reminder when it is sent.

To remove a note, right click on the appointment and select '**Remove Note**'.

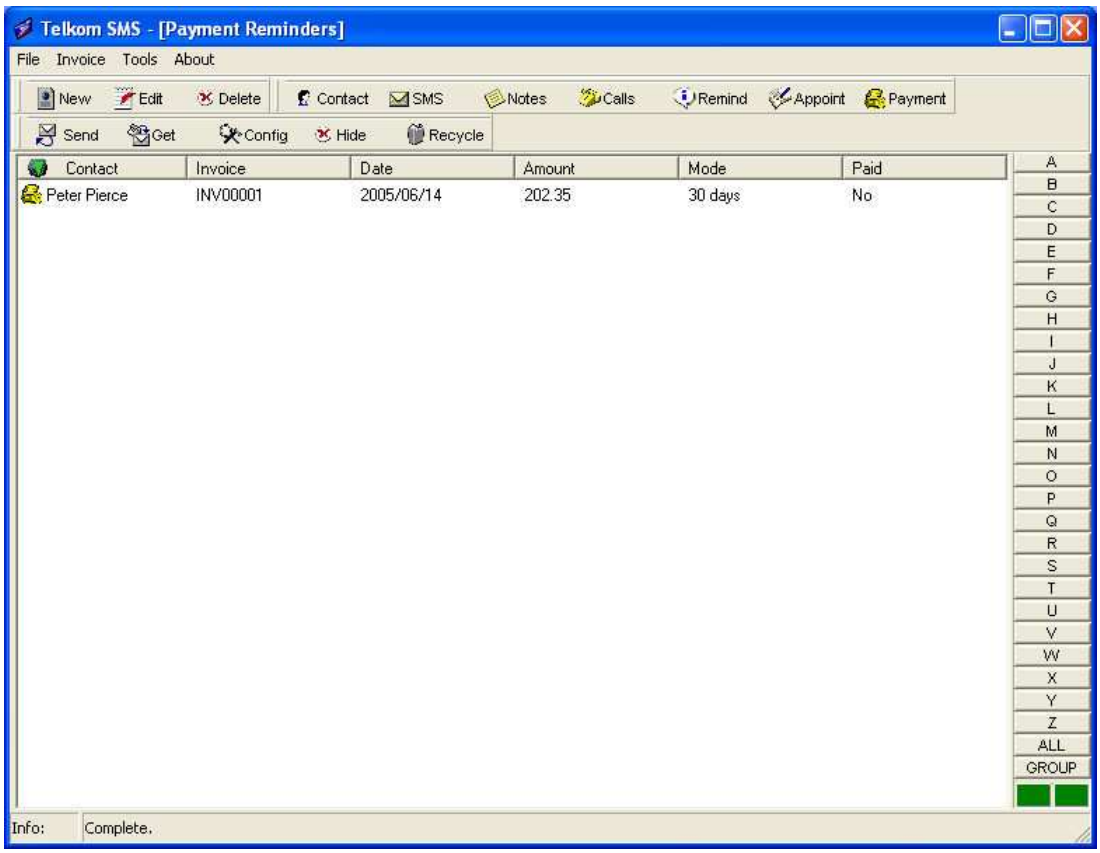
Notes can be viewed in the Notes List.

16 PAYMENT REMINDERS

Payment reminders are used to remind clients of overdue invoices via SMS.

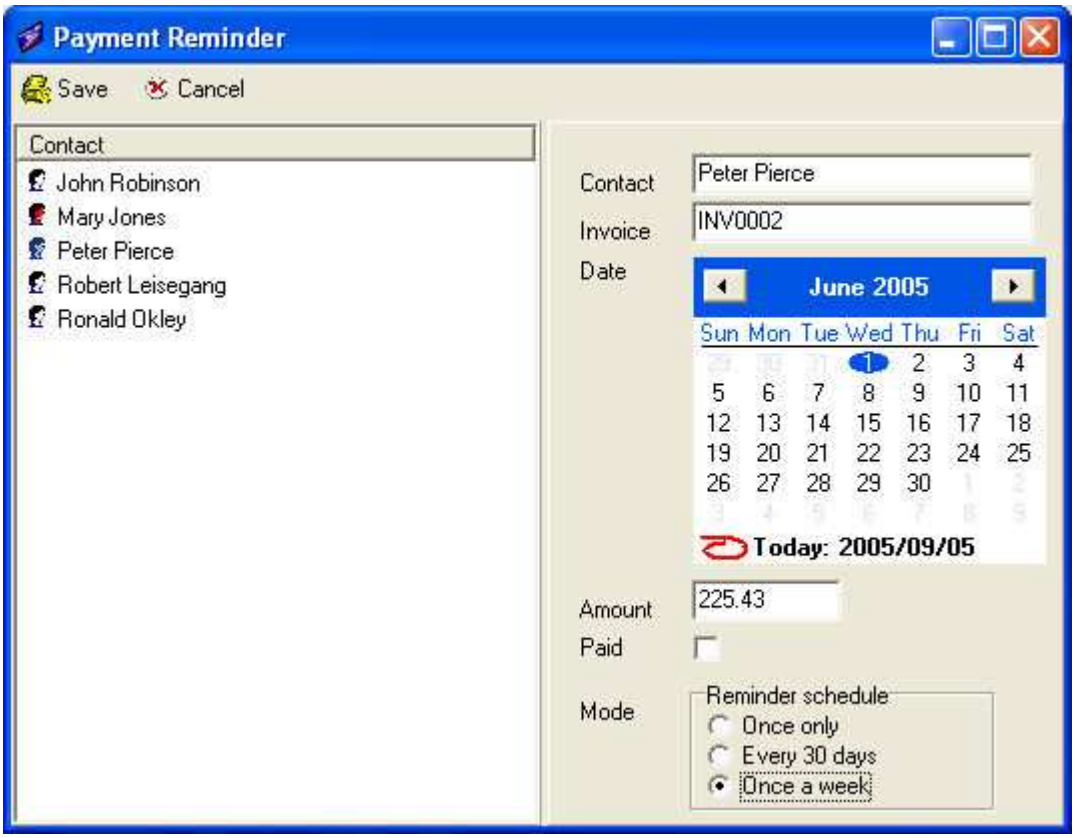
To display the Payment Reminder List click on the **[Payment]** button on the (Taskbar or Sidebar).

The following form will be displayed.


Telkom SMS - [Payment Reminders]
File Invoice Tools About
New Edit Delete Contact SMS Notes Calls Remind Appoint Payment
Send Get Config Hide Recycle
Contact Invoice Date Amount Mode Paid
Peter Pierce INV00001 2005/06/14 202.35 30 days No
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL GROUP
Info: Complete.

16.1 Creating a Payment Reminder

To add a Reminder, select **New** using the File Menu, Task Bar or Popup Menu. The following form will be displayed.



Use the following procedure to enter a new payment reminder:

Select the client from the list on the left hand side.

Enter the invoice reference number

Click on the calendar to select the invoice date

Enter the invoice amount.

Select the reminder option

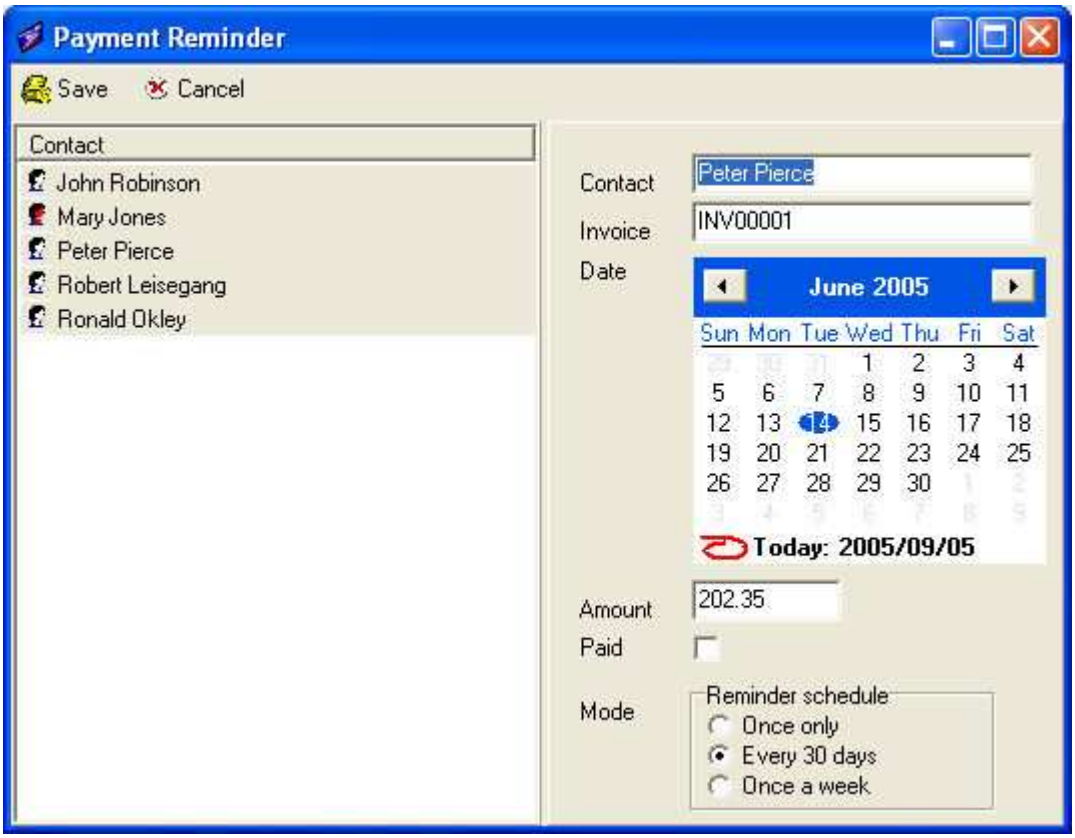
Once only will transmit the reminder once.
Every 30 days will send the reminder on the 1st of every month.
Once a week will send the reminder every Monday.

Reminders will be sent until the Payment Reminder is marked as paid.

The SMS generated will be in the form designed using the Payment Reminder Configuration.

16.2 Editing a Payment Reminder

To edit a Reminder, select **Edit** using the File Menu, Task Bar or Popup Menu. The following form will be displayed.



Edit the payment reminder. (Note: It is not possible to re-assign the Contact whilst editing)

Reminders will be sent until the Payment Reminder is marked as paid.

16.3 Setting a Payment Reminder as Paid / Unpaid

To set the Reminder as Paid, select **Set Paid** using the File Menu (**Tools, Set Paid**) or Popup Menu.

To set the Reminder as Unpaid, select **Set Unpaid** using the File Menu (**Tools, Set Unpaid**) or Popup Menu.

When a Payment Reminder is set as Paid, A Payment Received SMS will be sent.

The SMS generated will be in the form designed using the Payment Received Configuration.

16.4 Deleting a Payment Reminder

Select the Payment Reminder that you wish to delete in the Payment Reminder list and click on the **[Delete]** button on the Taskbar.

Alternatively right click on the list item and use the Popup Menu, File Menu or press the **Del** key on the keyboard

Multiple Reminder deletes are also possible by selecting a range of reminders.

Note: When Payment Reminders are deleted, they are still retained within the system database. These *deleted* items can be viewed in the Payment Reminders Recycle Bin.